

The Realising Digital Value (RDV) Playbook

Achieving Transformational Impact from Digital Innovations

Our Mission

The Realising Digital Value (RDV) Playbook is a new approach specifically designed for the modern Digital Society Era. It is founded on the principles of benefits realisation, originally developed to achieve Return on Investment (ROI) from Information Technology projects. It is designed to achieve transformational impact and deliver economic, social, cultural and ethical value from Digital Technology projects.

Benefits and value realisation is a recognised and documented concept, used over many decades in both the Private and Public Sectors. The RDV Playbook is a new approach for a new Digital Future.

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The Challenge

Digital Challenges

The post-pandemic world, replete with unheralded economic and geopolitical changes have surfaced complex and difficult challenges for digital technology innovators, developers and users. The challenges are manifold:

1. Digital technology innovators, both in the UK private and public sectors, are typically constrained by procurement processes because they do not usually have the bidding infrastructure, time, knowledge and experience for writing successful technology-led business cases.
2. Understanding and navigating all of the technical, economic, social, political, cultural and ethical complexities, with competing requirements and constraints both within and across organisations, represent significant challenges to the successful design and adoption of digital innovations.
3. Some of the complexities include dealing with the constraints of legacy systems which can be costly or difficult to integrate and replace. The people who need to be involved in strategy, specifications, design, development and adoption, are often too busy to tell you what they need and there are conflicting stakeholder views on priorities, needs, strategic imperatives, user and technical requirements.
4. There is a need for urgent development and deployment of digital innovations, but budgetary constraints often inhibit proper planning for transformational change, learning and training of users.
5. Responding to these challenges, the Realising Digital Value (RDV) Playbook, aims to equip digital innovators and digital project teams with a means to think systemically about how to achieve transformational impact, deal with complex challenges, and translate innovative ideas into successful business cases and actionable plans for realising the value from digital innovations.

If you are a Digital Tech Developer/Innovator, you may see RDV as an unnecessary bureaucratic or managerial distraction. This is understandable, but in fact, it is an extremely important and modern extension of the benefits realization management framework that many Private Sector and Public Sector Organisations increasingly demand and use. So, here's a quick run down of what you need to know and do.

Realising Digital Value & Benefits Realisation Management

Applying an evidence-based approach and evaluation process to Digital Health Technology Systems design, development, implementation and adoption .

Think about and start to answer these questions

- What is the type, ambition and scale of digital transformation you envisage?
- What are the benefits & value? (projected from your project)
- What can you evidence and how can you present it?
- What do you need? (more funding?, a test bed?, tech support?...)
- Who can help? (commissioners, senior management, funding bodies, research teams, tech developers, stakeholders, peer projects)
- What will tick their boxes; what benefits will they value the most; what discourse do they use?
- How can you best frame what you have to get what you need?

Realising Digital Value (RDV)

RDV: 5 Stages

Activities

1. Identify & define digital opportunities and structure problems

- Analyse the drivers to determine the investment objectives
- Identify the benefits & value that will result by achieving the objectives and how they will be measured
- Establish ownership of the benefits & value
- Identify the changes required and stakeholder implications
- Produce first cut business case

2. Plan realisation of digital value & management

- Finalise measurements of benefits, value and changes
- Obtain agreement of all stakeholders to responsibilities and accountabilities
- Produce benefits & value plan and investment case

3. Develop & evaluate digital application prototypes;
Execute RDV plan

- Manage the change programmes
- Review progress against the benefits & value plan

4. Review and evaluate digital application project results

- Formally assess the benefits & value achieved or otherwise
- Initiate action to gain outstanding benefits & value where feasible
- Identify lessons for other projects

5. Identify potential for further digital applications, projects & value

- Identify additional improvements through business changes and initiate action
- Identify additional benefits & value from further IT investment

From: Ward, J and Daniel, E.M. (2012) "Benefits Management: How to increase the Business Value of Your IT Projects", 2nd Edition, Wiley

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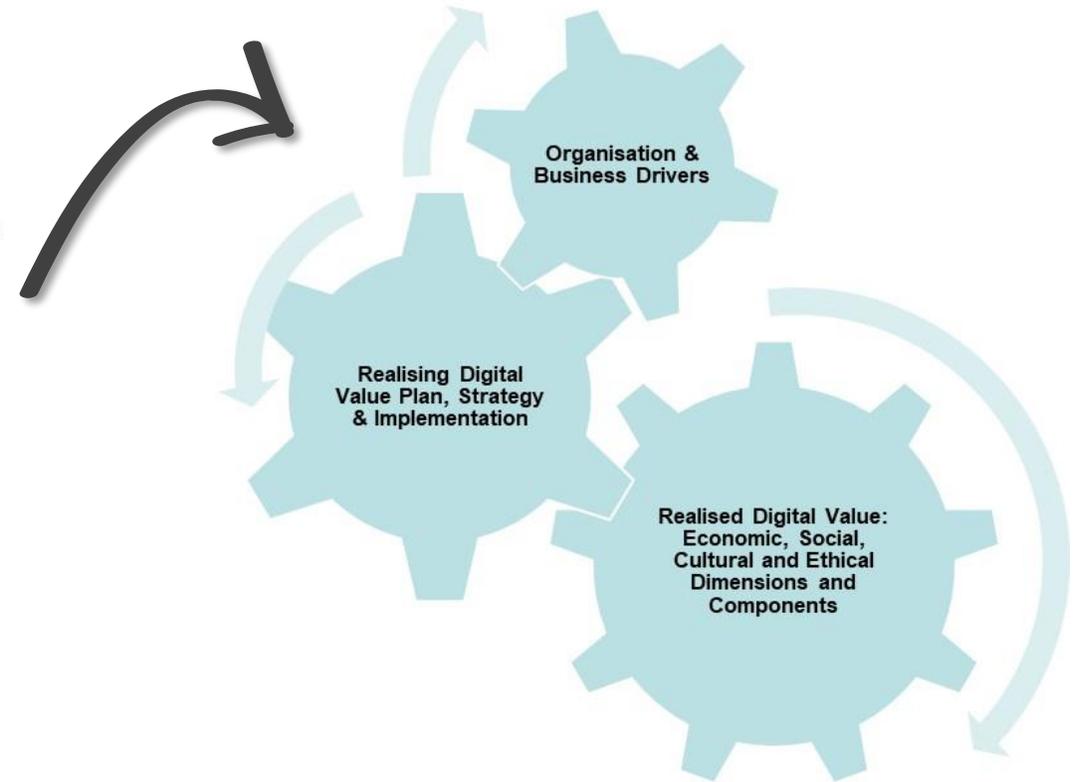
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The Realising Digital Value Management Lifecycle

The Realising Digital Value Management Lifecycle



It is a Continuous Evolution



Adapted by the playbook authors, from: Ward, J and Daniel, E.M. (2012) "Benefits Management: How to increase the Business Value of Your IT Projects", 2nd Edition, Wiley

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RDV – The Journey Ahead

The Full Realising Digital Value Management Lifecycle

- Digital Transformation**
- Cultural Change
 - New Strategic Imperatives
 - Economic/Financial Benefits/ROI
 - Organisational Structural Change
 - Societal Impact, Social Change
 - Technological Innovation
 - Creative Re-design of Work
 - Ethical Accountability
 - Corporate Social Responsibility
 - User/Citizen & Tech Accommodations

- Digital Value Profiles**
- ID, title description
 - Owner, Actors
 - Timeline, measures, risks

- Digital Value Playbook**
- Value Definitions
 - Identify Digital Project Drivers
 - Map Value to Drivers/Objectives
 - Define Core Value Types: Economic, Social, Cultural, Ethical
 - Provide Tools/Resources for RDV Lifecycle

- Digital Value Assessment**
- Value Realised/Not Realised
 - Actual versus Forecast/Anticipated

- Digital Visibility**
- Establish Shared Vision, Objectives
 - Define need for Transformational Change
 - Demonstrate Value Iteratively
 - Develop and Manage an Evidence-Base

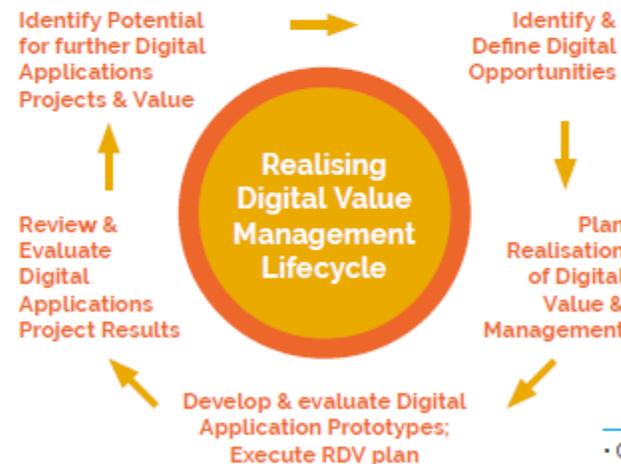
- Actions**
- Identify Stakeholders
 - Plan Change Process
 - Manage Expectations
 - Identify Negative Value
 - Assess Culture/Create sub-cultures
 - Develop Ethical checklist/plans

- Digital Value Ownership**
- Identify Key Sponsors
 - Engage, Enrol Decision Makers
 - Engage Users, Developers
 - Determine Accountabilities
 - Engage Citizens, Public, Politicians

- Develop Business Case**
- Produce Outline Business Case
 - Define Business & Service Models
 - Establish and Incorporate Stakeholder Concerns
 - Co-develop with Stakeholders

- Digital Value Capability**
- Benchmark similar organisations
 - Capability and Maturity Assessment
 - Core Competencies Identification
 - Capability Improvement Planning
 - Knowledge Acquisition, Sharing
 - Training and RDV Tool Support

- Digital Value Realisation Plan**
- Collaboratively Develop Plan
 - Document Plan, get comments and Share
 - Identify, Argue & Justify Resources
 - Risk Assessment & Management
 - Identify Enabling Changes
 - Share Change Management Strategy
 - Develop Measures
 - Define the Evidence Base
 - Map to Business Case & Project Plan



Related Reading: Benefits Realisation Management, Association of Project Managers (APM) The BRM Systems Lifecycle: White, N & Casey, R. (2017)

<https://www.apm.org.uk/resources/find-a-resource/benefits-management-lifecycle>

To Download this RDV Lifecycle Map And the related Benefits Realisation Management Diagram Hover and Click on the Tools below

RDV Management Lifecycle 

Benefits Realisation Management Lifecycle, APM article/publication 

Benefits Realisation Management Lifecycle diagram, APM 

Realising Digital Value

Stage One

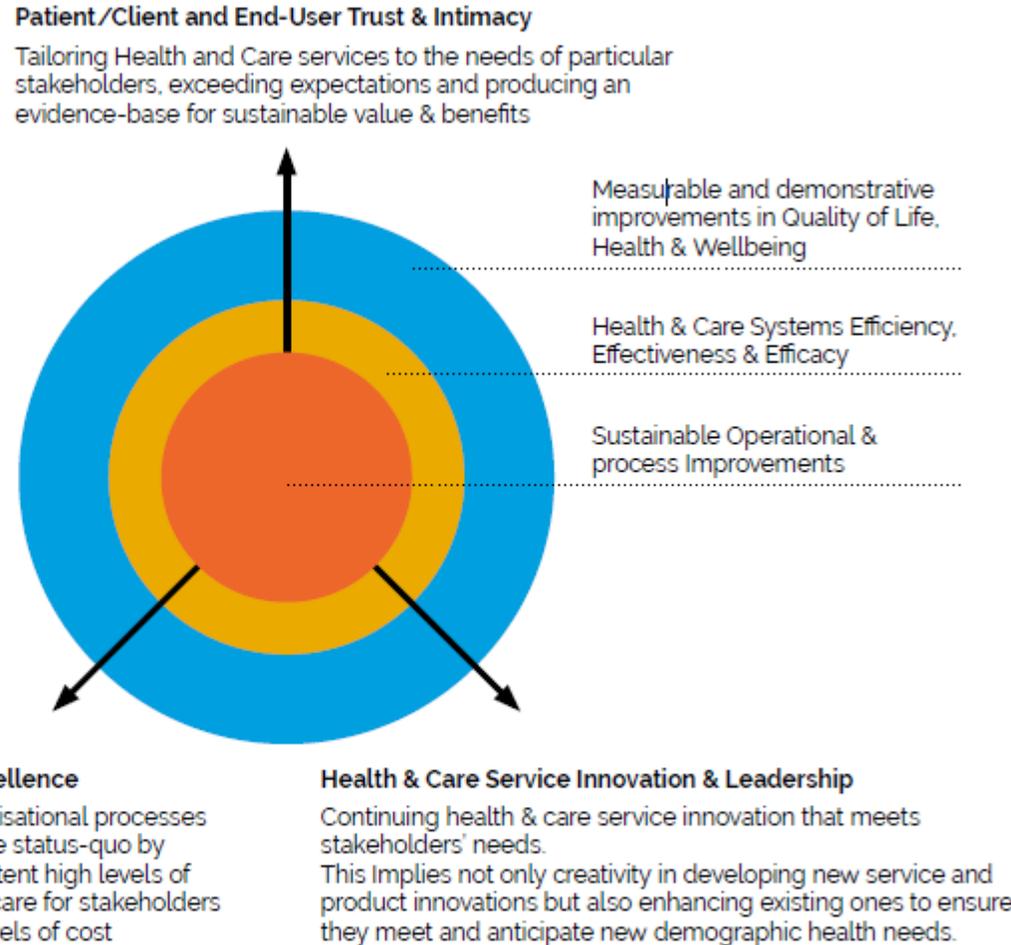
Identify & define digital opportunities and structure problems

Identify & define digital opportunities and structure problems

Digital Healthcare Example

1. Identify & define digital opportunities and structure problems
2. Plan realisation of digital value & management
3. Develop & evaluate digital application prototypes; Execute RDV plan
4. Review and evaluate digital application project results
5. Identify potential for further digital applications, projects & value

The Big Picture:
Structure your Healthcare Problem, Define your Innovation, its Drivers - and how it will create value & make an impact



1.1 Use a Problem Structuring Method or Technique to help you structure your healthcare problem, define your OS Application and Tech innovation, its drivers, operation and potential impact. Soft Systems Methodology (SSM) rich pictures can be used for this task. Click on the Tool Link below which will take you to a SSM workbook/guide by Professor Jeremy Rose from the University of Skövde, Sweden.

SSM Workbook

(Prof Jeremy Rose, based on the original work by Prof Peter Checkland)



Also, check out his Software Engineering course at: <https://www.slideshare.net/jeremyrose>

Contextualised model, based on: The Dimensions of Competence (Adapted from Treacy and Wiersema (1993) Harvard Business Review, 71(1), pp. 84-93.

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1.2 Answer the following value/benefits questions about your project; its current state, the opportunities afforded, and the future vision

1. What is the current diagnosis of the problem situation?
2. What current and future challenges could the project resolve?
3. What are the opportunities and the anticipated future vision?
4. Who are the stakeholders?
5. What are the stakeholders aims, expectations?
6. What are the stakeholders concerns, fears?
7. What difference will your project make to them?
8. What types of value and impact will your project deliver
9. How can you evidence any value and proposed impact?
10. What are the organisation's key performance indicators?
11. How will your project directly/indirectly help achieve them?

1.3 Create a balanced scorecard of value/benefits for your project recreating the 2x2 example (dental referral system) matrix below

		Zone of Effect	
		External	Internal
System	Process	Quality of Care, Clinical outcomes <ul style="list-style-type: none"> • more accurate care bcs of more accurate information • shorter waits to better outcomes and earlier treatment • care including special needs eg dementia 	System costs <ul style="list-style-type: none"> • less duplication • fewer errors • lower costs • faster accurate payments • right first time, reduced queries
	People	Patient Experience <ul style="list-style-type: none"> • shorter waits (whilst in pain) • more confidence in invoices • less anxiety that correct information is with dentist 	Staff R&R, Staff Satisfaction <ul style="list-style-type: none"> • most time on looking after patients, less on data capture and filling in forms • less anxiety of getting things wrong/ having wrong information • more confidence in quality of care • get their lunchtimes back • safety, know what to expect from eg violent patients

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1.4 Start thinking about some potential value & benefits from the effective deployment of your application

Example: Value & Benefits for Healthcare Open-Source Digital Systems and Applications

- Offloading tasks,
- Logging data,
- Digitisation of paper-based tasks,
- Time-saving,
- Money-saving,
- Improves patient experience / quality of interaction,
- Increases time with patient
- Streamlining workflows
- Improving audit capabilities,
- Decrease in documentation,
- Centralised data collection / shared between hospitals,
- Realtime data awareness (not just annual audit info),
- Whole ward overviews & real-time data awareness,
- Improved medical & Social Care

More Examples: ODONTO/Dental Services Application 

More Examples: Other Open-Source Digital Technology Applications 

More Value/Benefits: Some Health Service Examples

- Improving communication for isolated patients,
- Reducing workload on staff,
- Personalising & Socialising care provision,
- Safeguarding, improving Wellbeing
- Improved accuracy in charting information,
- Self managing chronic illnesses,
- Providing technical knowledge,
- Reducing need for appointments,
- Collective problem solving,
- Data capture & research framework.
- Personalisation of treatment
- Creates data for Analysis (Healthcare Analytics)
- Provides opportunity to harness AI applications
- Enables enhanced recovery
- Reduces Bed-time – Frees up Occupancy

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The Value Impact Matrix

STRATEGIC	HIGH POTENTIAL
Value will be mainly from DOING NEW THINGS and some things better. It should be MEASURABLE And can be both quantifiable value with financial benefits as well as Social Return on Investment (SROI)	Value/Benefits are unknown at this stage, but They should result from DOING NEW THINGS and Be observable or measurable
Value & Impact will be mainly from DOING THINGS BETTER plus Doing some new Things or stopping/ streamlining Things and be QUANTIFIABLE/FINANCIAL as well as Qualitatively Tangible such as SROI	Value will be mainly from STOPPING DOING non-value adding ACTIVITIES and THINGS And doing Things better and can be Financial or Non Financial
KEY OPERATIONAL	SUPPORT

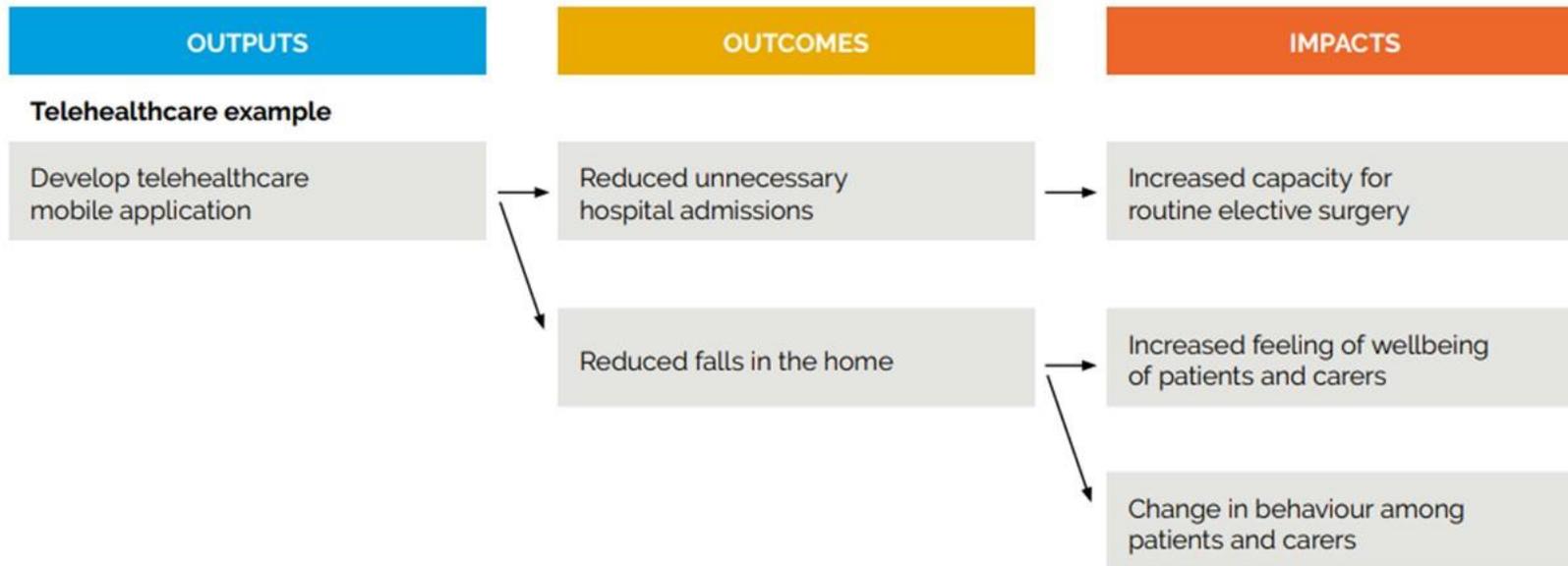
1.5 Further Classify your Value & Impact and identify those which are strategic or more operational – as well as estimating their future potential impact.

Contextualise the 2X2 Value Impact Matrix using these headings and classifications and put these into your business case

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1.6 Define your project's anticipated outputs, outcomes and impacts



1.7 Fill in the Template below:
you can use it as many times as necessary working down from a strategic to a more detailed operational level

Click on the Tool to access a Blank template for copy and completion



1.8 Make the appropriate linkages and causal connections between outputs, outcomes and impacts

Further reading about Technology-enabled care, business models, and a case study can be found by clicking on the url below.

Bhattacharya, S., Wainwright, D., Whalley, J. (2022) Value and Sustainability in technology-enabled care services: a case study from north east England, *Journal of Public Money and Management*, [Value and sustainability in technology-enabled care services: a case study from north-east England](#)

Realising Digital Value

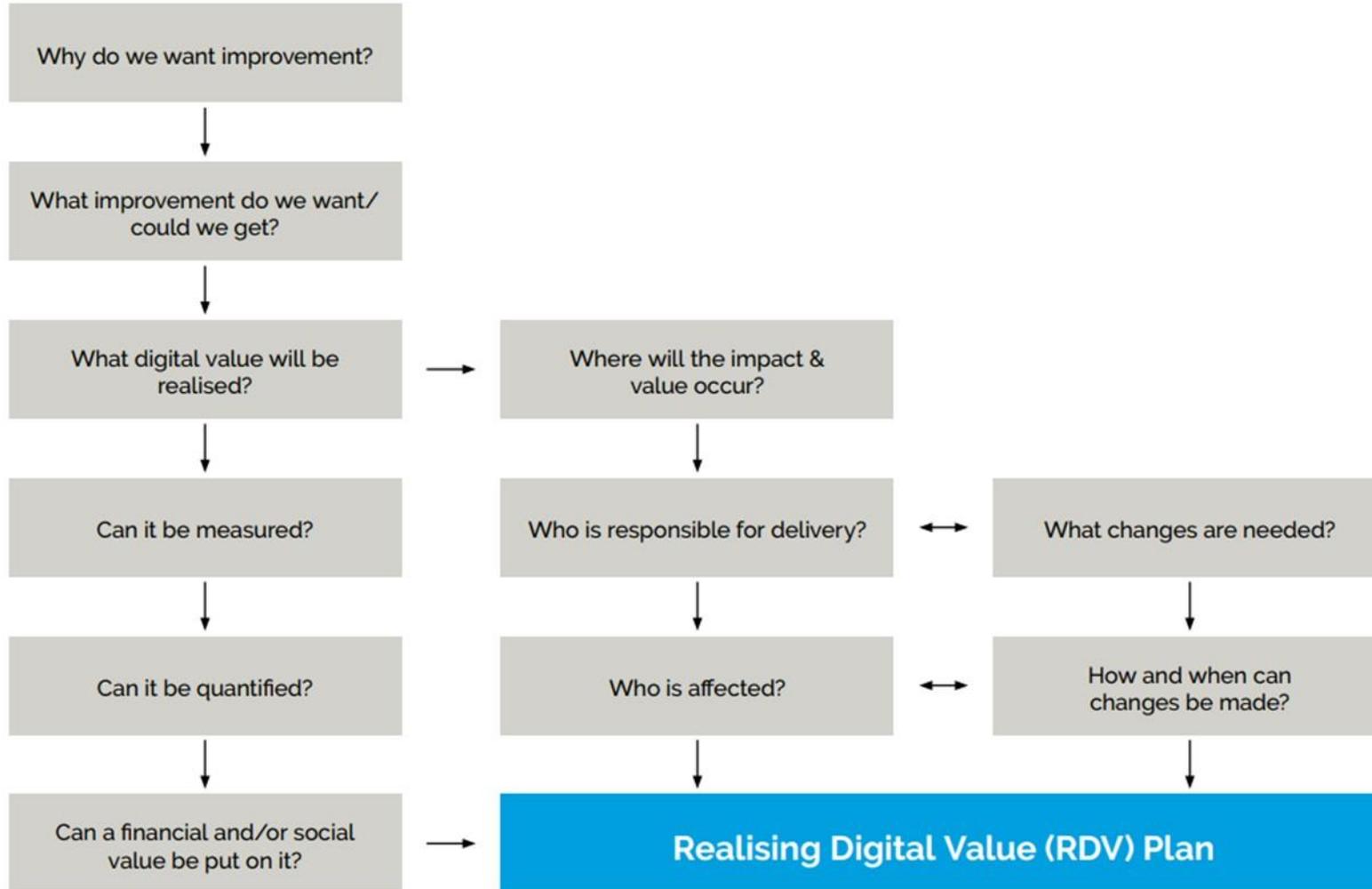
Stage Two

Plan realisation of digital value & management

Plan realisation of digital value & management

Adapted by the authors from: Ashurst, C. (2015) *Competing with IT: Leading a Digital Business*, Macmillan Education, Palgrave. And originally based on: Ward, J and Daniel, E.M. (2006) *Benefits Management: How to increase the Business Value of Your IS & IT investments*, Wiley

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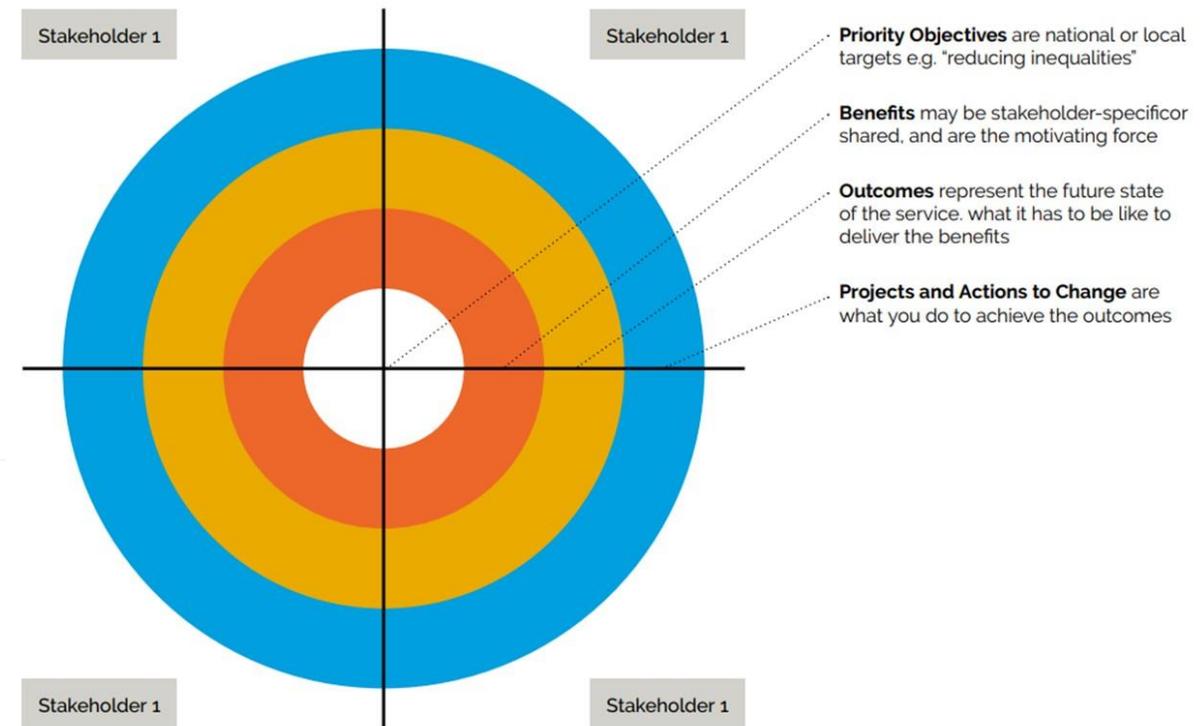
2.1 Work through these key questions to sketch out your Realising Digital Value (RDV) Plan. Involve your key Stakeholders and collect relevant and available data relating to current performance and anticipated improvements. This will be critical to undertaking and documenting this phase.

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2.2 Stakeholders: Answer these 9 Questions

1. **Who are all the Stakeholders? – and most importantly, including the end-users, clients or patients**
2. **What will the impacts & value (of the Digital App) mean to these different stakeholders?**
3. **What Evidence do you have, or could compile, for these?**
4. **Can you identify both Qualitative/Quantitative data and evidence?**
5. **What's next?: Pilot/ Trial/ Evidence/ Funding?**
6. **What do you need? (Executive/Cultural buy-in/ Support/ Funding/ Time/ Systems integration, Developers, Knowledge, Skills, Creativity, Talent)**
7. **Who can help you? What organizational culture do they conform to?**
8. **Do you know someone who has been successful in this process? Ask them to see if you can see their business case & project plan.**
9. **Do you know someone who is a supporter of your work that holds a position of power?**

2.3 Make a Stakeholder Analysis



Plan realisation of digital value & management

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c = Current state
r = Realised future state

Commitment (current & required)

Stakeholder Group	Benefits Perceived (disbenefits)	Changes Needed	Perceived Resistance	Anti	None	Allow it To happen	Help it happen	Make it happen
List of stakeholders and stakeholder groups – especially resisters and compromisers	Individual and organisational benefits for each stakeholder and group	Changes to be made by or which affect each stakeholder or group	Resistance of each stakeholder or group and reason for this	Are against the project and will attempt to stop or to hinder progress	Are unaware the project is going on or do not think it affects them	Will comply when requested to do tasks required by the project e.g. attend training	Will provide knowledge, time and resource to ensure the project meets objectives and timescales	Will instigate, oversee or carry out changes and ensure that all relevant changes are completed successfully
					c	→	r	
						c	→	r
					c	→		r

2.4 Use the template provided, or another of your choice, to chart your own stakeholder analysis and anticipate any change management imperatives

Click on the Tool to access a Blank template for copy and completion



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The Benefits Canvas

Area: Date: Version:

Initiatives & Work 	Supporting Outcomes 	Benefits 	Objectives 
Assumptions & Risks & Dependencies 	Measures (& Targets) 		Stakeholders 

2.5 Use the Value & Benefits Canvas template provided, or another of your choice, to start to connect project elements with outcomes, benefits and the intended objectives.

Also, make any assumptions and dependencies explicit, as well as any specific measures and responsible owners and stakeholders.

You can do this at multiple levels of your Digital Project - from strategic to more operational layers.

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www.benefiteer.com

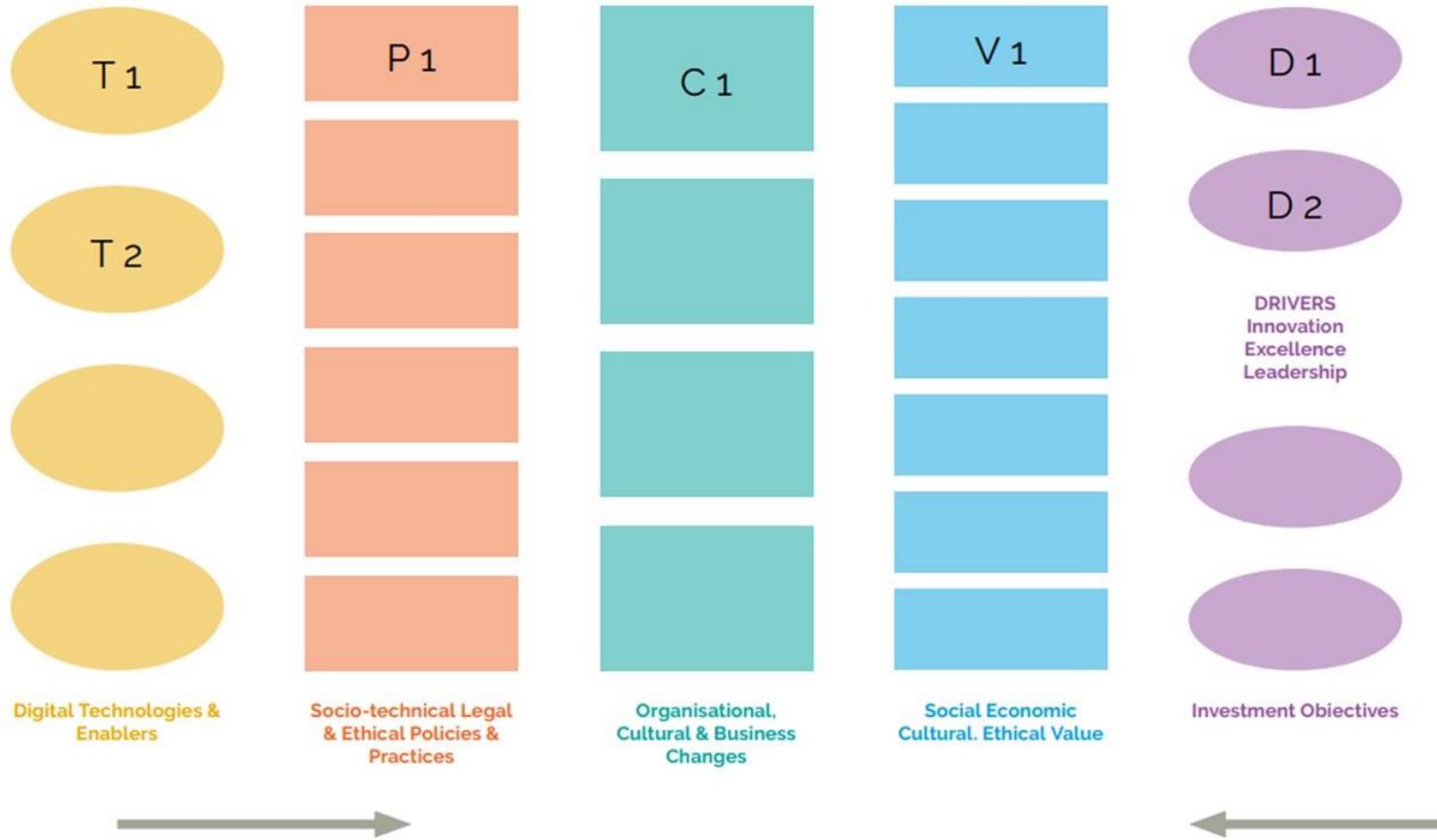
Click on the Tool to Download and access a Blank Benefits Canvas (PowerPoint Wovex Version) for copy and Completion. Also from www.wovex.com
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Plan realisation of digital value & management

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Realising Digital Value (RDV) Network Example (High Level) Template



2.6 Use the template provided, or another of your choice, to chart your RDV, make dependencies, and contextualise it. You can do this at multiple levels from strategic to more operational layers.

T 1, 2 etc Digital Tech and IS/IT Enablers

P 1, 2 etc. Socio-technical Enabling Changes, Policies and Practices

C 1, 2 etc Business, cultural or organisational changes

V 1, 2 etc. Business or health/wellbeing Social, Economic, Cultural & Ethical Value

D 1, 2 etc. Strategic Drivers, Investment or other objectives

Click on the Tool to access a Blank template for download, copy and completion

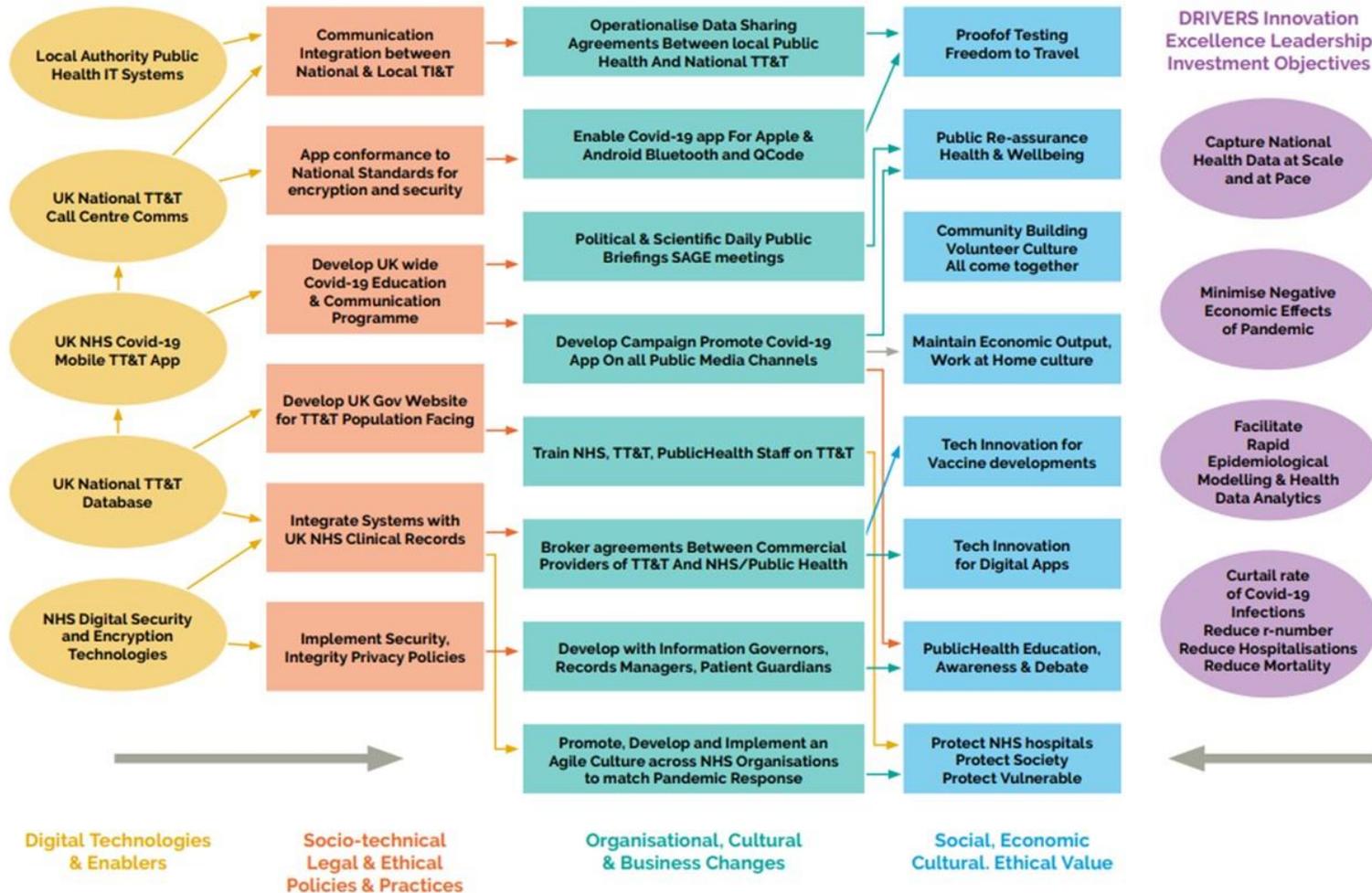


2.6 Hint: You may also want to produce 4 versions of this RDV network Template. Each version to focus on the four key dimensions of Value comprising: Social, Economic, Cultural and Ethical (SECE).

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Realising Digital Value (RDV) Network Example (High Level)
UK Test, Track & Trace Covid-19 App



2.7. Contextualise this example for your own Digital Application:

N.B. This RDV network example is based on publicly available information – and is not intended to be viewed as an official representation. It is purely the authors’ interpretation of the UK test, track and trace systems used to illustrate the application of the RDV network technique.

Plan realisation of digital value & management

2.8 Complete the Benefit/Value Template and Cross Reference with your Benefits Dependency Network using the appropriate code labels

Benefit/Value number and type and related objectives	Value/Benefit description	Value/Benefit owner(s)	Dependent changes and responsibilities	Measures	Expected value (if applicable)	Due date

1. [Identify & define digital opportunities and structure problems](#)
2. [Plan realisation of digital value & management](#)
3. [Develop & evaluate digital application prototypes; Execute RDV plan](#)
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Click on the Tool to access a Blank template for copy and completion



Benefit/Value number and type and related objectives	Value/Benefit description	Value/Benefit owner(s)	Dependent changes and responsibilities	Measures	Expected value (if applicable)	Due date

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2.9 Complete the Change Template and Cross Reference with your Benefits & Value Dependency Network using the appropriate code labels

Change or enabler number and dependent benefits	Description	Responsibility and involvement	Prerequisite (P) and or consequent (C) changes	Evidence of completion	Due date	Resources required
	Implement new algorithm to optimise patient booking against available resources	Clinical Lead and Digital App Developer	Clinical lead development time Training for staff on new system and working with automated booking criterion	Reduction in staff time needed to book appointments		

Click on the Tool to access a Blank template for copy and completion



Change or enabler number and dependent benefits	Description	Responsibility and involvement	Prerequisite (P) and or consequent (C) changes	Evidence of completion	Due date	Resources required

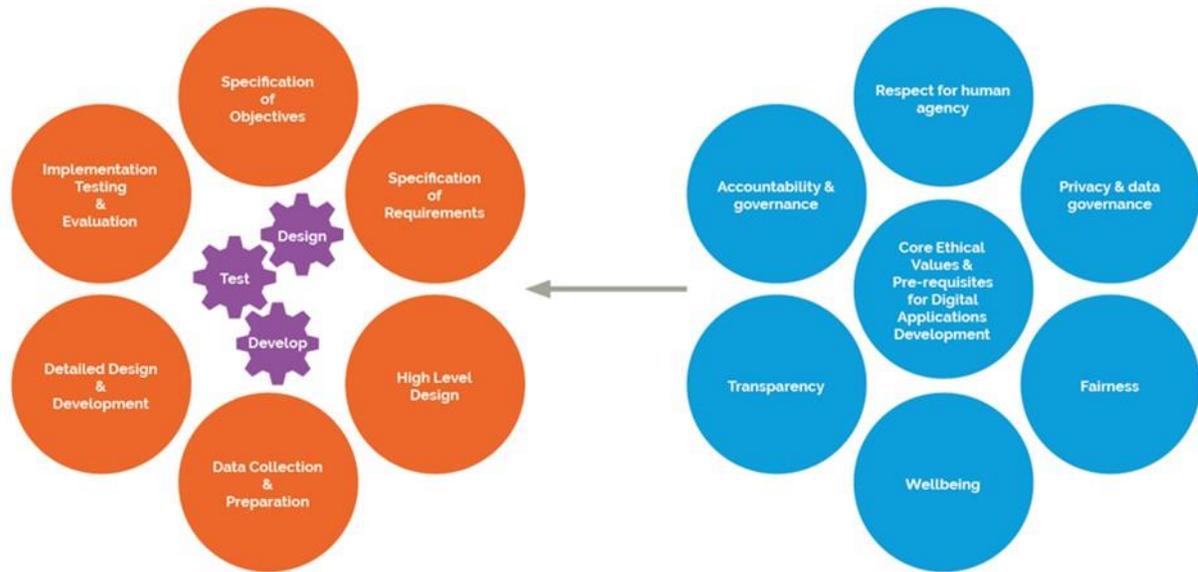
Plan realisation of digital value & management

Ethics by Design Approach & Methodology

1. [Identify & define digital opportunities and structure problems](#)
2. **[Plan realisation of digital value & management](#)**
3. [Develop & evaluate digital application prototypes; Execute RDV plan](#)
4. [Review and evaluate digital application project results](#)
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Stage Two: Plan realization of digital value & management

Ethics by Design Approach & Methodology



Take the opportunity to inculcate ethical value considerations, issues and opportunities into your Digital Application

2.10. Take the opportunity to inculcate ethical value considerations, issues and opportunities into your Digital Application

Read through the project SHERPA summary guide and adapt the recommendations to the context of your project

For a detailed overview of the Ethics by Design methodology (for AI systems) please refer to the European funded, Shaping the ethical dimensions of smart information systems, (SHERPA) project:
Click on the link below:
<https://www.project-sherpa.eu/wp-content/uploads/2019/12/development-final.pdf>

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Click on the link below

<https://www.project-sherpa.eu/wp-content/uploads/2019/12/development-final.pdf>

Realising Digital Value *Stage Three*

Develop & evaluate digital application prototypes

Execute RDV plan

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3.1 Link the Types of Benefits/Value with their proposed Performance Measures for your Project

Degree of explicitness	Do new things	Do things better	Stop doing things
Financial	By applying a cost/price or other valid financial formula to a quantifiable benefit a financial value can be calculated		
Quantifiable	Sufficient evidence exists to forecast how much improvement and benefit should result from the changes		
Measurable	This aspect of performance is currently being measured or an appropriate measure could be implemented. But it is not possible to estimate by how much performance will improve when the changes are complete		
Observable	By use of agreed criteria, specific individuals/groups will decide, based on their experience or judgement to what extent the benefit has been realised.		

Degree of explicitness	Do new things	Do things better	Stop doing things
Financial			
Quantifiable			
Measurable			
Observable			

3.1 Copy and complete this template to contextualise your project's types of measures and how they relate to the 3 criteria:

- Doing new and innovative things
- Doing things better, more effectively
- Stopping doing unnecessary activities or things that do not add any value

Click on the Tool for a Blank Template For Types of Measures



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3.2 Check your performance measures against the following criteria and characteristics

Relevant	To the organisation’s strategy and able to demonstrate progress towards achievement
Well Defined	Clear and unambiguous, easy to understand both in terms of the definition of the measures and how it is calculated
Attributable	Those whose performance is being measured can influence the result by their own actions and are not dependent on the performance of others
Comparable	Performance can be compared over time and across different groups carrying out the same tasks
Contextual	They cannot be misinterpreted – the assumptions and limitations of the measures are understood

Criteria for effective performance measures (HM Treasury, 2001)

Focused	No more measures than are necessary, clearly linked to and prioritised in relation to the organisation’s strategy
Appropriate	To the people who will use the information to improve performance – presentation tailored to different users
Balanced	To cover all areas of business and organisational activity – different types of measures to reflect different stakeholders’ interests
Robust	Not dependent on ways of working and organisational structures – not sensitive to organisational changes
Integrated	Part of the business planning process and linked to individual and organisational success criteria
Cost effective	In terms of the cost of data collection and timeliness for use in decision making

Characteristics of good performance measures (HM Treasury, 2001)

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Degree of explicitness	Do new things	Do things better	Stop doing things
Financial			
Quantifiable			
Measurable			
Observable			

Degree of explicitness	Do new things	Do things better	Stop doing things
Financial			
Quantifiable			
Measurable			
Observable			

STRATEGIC	HIGH POTENTIAL
Value will be mainly from DOING NEW THINGS and some things better. It should be MEASURABLE And can be both quantifiable value with financial benefits as well as Social Return on Investment (SROI)	Value/Benefits are unknown at this stage, but They should result from DOING NEW THINGS and Be observable or measurable
Value & Impact will be mainly from DOING THINGS BETTER plus Doing some new Things or stopping/streamlining Things and be QUANTIFIABLE/FINANCIAL as well as Qualitatively Tangible such as SROI	Value will be mainly from STOPPING DOING non-value adding ACTIVITIES and THINGS And doing Things better and can be Financial or Non Financial
KEY OPERATIONAL	SUPPORT

Degree of explicitness	Do new things	Do things better	Stop doing things
Financial			
Quantifiable			
Measurable			
Observable			

Degree of explicitness	Do new things	Do things better	Stop doing things
Financial			
Quantifiable			
Measurable			
Observable			

3.3 Map your Benefits against their potential impact from operational to strategic.

Copy and complete the Benefits Impact Matrix and link to their performance measures as in the example diagram.

Click on the Tool for a Blank Template of the Benefits Impact Matrix



Realising Digital Value *Stage Four*

Review and evaluate digital application project results

Review and evaluate digital application project results

1. Identify & define digital opportunities and structure problems
2. Plan realisation of digital value & management
3. Develop & evaluate digital application prototypes; Execute RDV plan
4. **Review and evaluate digital application project results**
5. Identify potential for further digital applications, projects & value

4.1 Map out your Benefits/Value and their associated Performance Measures/KPIs/Targets using the previous benefits/value and measurement matrices ready for development into greater numerical detail using appropriate Office Tools such as Microsoft Excel, Google Sheets or equivalent.

4.2 Download the Simple Excel BRM Tracking Template example below. This was developed as part of a business case for a Nurse Rostering Application in a Hospital Trust. This can be tailored and contextualized for your own OS Healthcare Application. A More detailed version can be found in the next activity (4.3)

4.2 Download, Tailor, and complete the Benefits Tracking Template (developed by Dr Rebecca Casey) below:

Click on the Tool for a Simple Excel Template For BRM Measurement, Analysis and Tracking



Review and evaluate digital application project results

*This table can be used as the plan which is created at Outline Business Case (OBC) and finalised at Full Business Case (FBC)
This table can be used in delivery, once the Full Business Case (FBC) has been completed, for tracking purposes.*

Ref#	Link to Strategic Outcome#	Description of Benefit#	Benefit Owner(s)#	Benefit Recipient#	Relevant Milestones#	Measurement#		Baseline#	Target#	Value#	Realisation Date(s)#	Status#	Notes#
						How#	When#						
Dis-benefits#													

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Click on the tool below for the BR Tracker Template Excel Example



You can then Tailor this for your own Organisation and Application

Section Break (Next Page)

- Include Dis-benefits at the bottom of the table, completing the relevant columns#
- The Owner is the person who is responsible for the delivery of the expected benefits#
- The Benefit Recipient is the person, who will 'benefit' from the realisation. #
- Include the milestone(s) relevant to when the benefit will be realised#
- Describe how to measure achievement of expected benefits, and when they can be measured#
- Baseline measure from which the improvements will be calculated#
- Target measure that will signal the benefit successfully delivered#
- The value is the monetary value assigned to if possible, for the cost-benefit analysis#
- Enter the date(s) that the benefit will be realised/delivered#
 - The status of the benefit, use RAG colour key in the tables#
 - Notes, also include the date the plan has been updated#

4.3 Download a more detailed example of a Benefits Realisation Tracker Template (Healthcare Example) developed by David Morton (Change Manager, RMIT University) in Excel. This can be downloaded under open licence for use in the Public Sector Community from the Knowledge Hub www.khub.net

Review and evaluate digital application project results

Social Return on Investment (SROI) methods and techniques

4.4 At this stage you will find that you may need to account for both quantitative and qualitative benefits measures, using either direct measurement units or proxies if this is more complicated. You may find it beneficial to use Social Return on Investment (SROI) methods and techniques to identify more qualitative benefits and then to be creative concerning how to represent them in numerical terms.

Case studies, vignettes and other social science evidence-based methods may be used in conjunction with the more classical financial and non-financial performance KPIs and Metrics. SROI is now accepted as an investment appraisal method to justify business cases for transformation change and improvement programmes especially Digital IT projects

1. Identify & define digital opportunities and structure problems
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4.5 Determine if your application will produce a range of benefits that will be difficult to quantify in a classical accounting fashion. This can be typical for healthcare applications where they might produce a noticeable change and influence on wellbeing, mental health, quality of life or knowledge about illness, diagnosis, treatment etc.

SROI can help with the development of a robust business case and RDV/BRM plan that will highlight such impacts in order to justify financial and resource investment – which in many cases may need to be longer term and more sustainable for future Digital Transformation Projects.

Review and evaluate digital application project results

Social Return on Investment (SROI)
www.thesroinetwork.org

SROI: Definitions

SROI is a framework for measuring and accounting for a much broader concept of value; it seeks to reduce inequality and environmental degradation and improve wellbeing by incorporating social, environmental and economic costs and benefits. SROI measures change in ways that are relevant to people or organisations that experience or contribute to it. It tells the story of how change is being created by measuring social, environmental and economic outcomes and uses monetary values to represent them.

SROI is about value rather than money and is a widely accepted way of conveying value. It is much more than a number and is a story about change, on which to base decisions, that includes case studies and qualitative, quantitative and financial information.

There are two types of SROI:

- **Evaluative:** which is conducted retrospectively and based on actual outcomes that have already taken place.
- **Forecast:** which predicts how much social value will be created if the activities meet their intended outcomes.

Forecast SROIs are especially useful in the planning stages of an activity and can be used within Benefits Realisation planning, measurement and management as well as becoming a key component of a successful business case.

1. [Identify & define digital opportunities and structure problems](#)
2. [Plan realisation of digital value & management](#)
3. [Develop & evaluate digital application prototypes; Execute RDV plan](#)
4. **[Review and evaluate digital application project results](#)**
5. [Identify potential for further digital applications, projects & value](#)

Key Principles of SROI

- Involve stakeholders
- Understand what changes
- Value the things that matter
- Only include what is material (information can be material if it has impact)
- Do not over-claim (manage expectations and optimistic bias)
- Be transparent (communication and access to data/information is key)
- Verify the result (adopt an evidence-based approach)

Key Stages of SROI

- Establish scope and identify key stakeholders
- Map the outcomes
- Evidence outcomes and give them a value
- Establish the impact
- Calculate the SROI
- Report, use and embed good outcomes and share with stakeholders

Self – Assessment Tool and Extracts from: The Guide to Social Return on Investment, The SROI Network (2012)

<https://socialvalueuk.org/resource/a-guide-to-social-return-on-investment-2012/>

<https://socialvalueuk.org/resources/social-value-self-assessment-tool/>

Review and evaluate digital application project results

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SROI: Downloads and Impact Map Template

You can download the SROI Network Impact Map Template (Excel Spreadsheet) which is a resource for determining and analysing SROI both quantitatively and qualitatively using the url link provided here:

<https://www.socialvalueuk.org/resource/blank-value-map/>

4.6 SROI – Produce your own SROI Impact Map

If you conclude that the Social Return on Investment (SROI) Methodology and Techniques will be useful to help you develop your Business Case and Benefits Realisation Plan, you should read the very informative SROI guide from the SROI network. This contains a worked example of Meals on Wheels.

You can then adopt those elements of the method that will be contextually relevant and useful for your Digital Applications innovation in order to assess the potential stakeholders, outputs, outcomes and impacts.

These can then be illustrated qualitatively and quantitatively (not forgetting to use proxy measurements where necessary) and even 'moneytised' using Present Value and Net Present Value techniques for financial accounting purposes.

See **SROI Task 4.7** for an example of an Excel example spreadsheet for the SROI Impact Map which can be downloaded and adapted for your project

Review and evaluate digital application project results

SROI Impact Map Excel Spreadsheet Example from the SROI Network

1. Identify & define digital opportunities and structure problems
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Stage 1		Stage 2				
Stakeholders	Intended/unintended changes	Inputs		Outputs	The Outcomes	
		Description	Value £		Description	
Who do we have an effect on? Who has an effect on us?	What do you think will change for them?	What do they invest?		Summary of activity in numbers	How would you describe the change?	

Stage 3						
The Outcomes (what changes)						
Indicator	Source	Quantity	Duration	Financial proxy	Value £	Source
How would you measure it?	Where did you get the information from?	How much change was there?	How long does it last?	What proxy would you use to value the change?	What is the value of the change?	Where did you get the information from?

Stage 1 duplicate	Stage 2 duplicate	Stage 4			
Stakeholders	The outcomes	Deadweight	Attribution	Drop Off	Impact
Groups of people that change as a result of the activity	Description	%	%	%	
	How would you describe the change?	What would have happened without the activity?	Who else contributed to the change?	Does the outcome drop off in future years?	Quantity times financial proxy, less deadweight, displacement and attribution

Stage 5					
Calculating Social Return					
Discount rate (%)			3.5%		
	Year 1 (after activity)	Year 2	Year 3	Year 4	Year 5
Present Value*	£79,718.43	£134.58	£61.06	£977.70	£850.17
Total Present Value (PV)					£81,741.93
Net Present Value					£39,366.93
Social Return £ per £					£193: £1

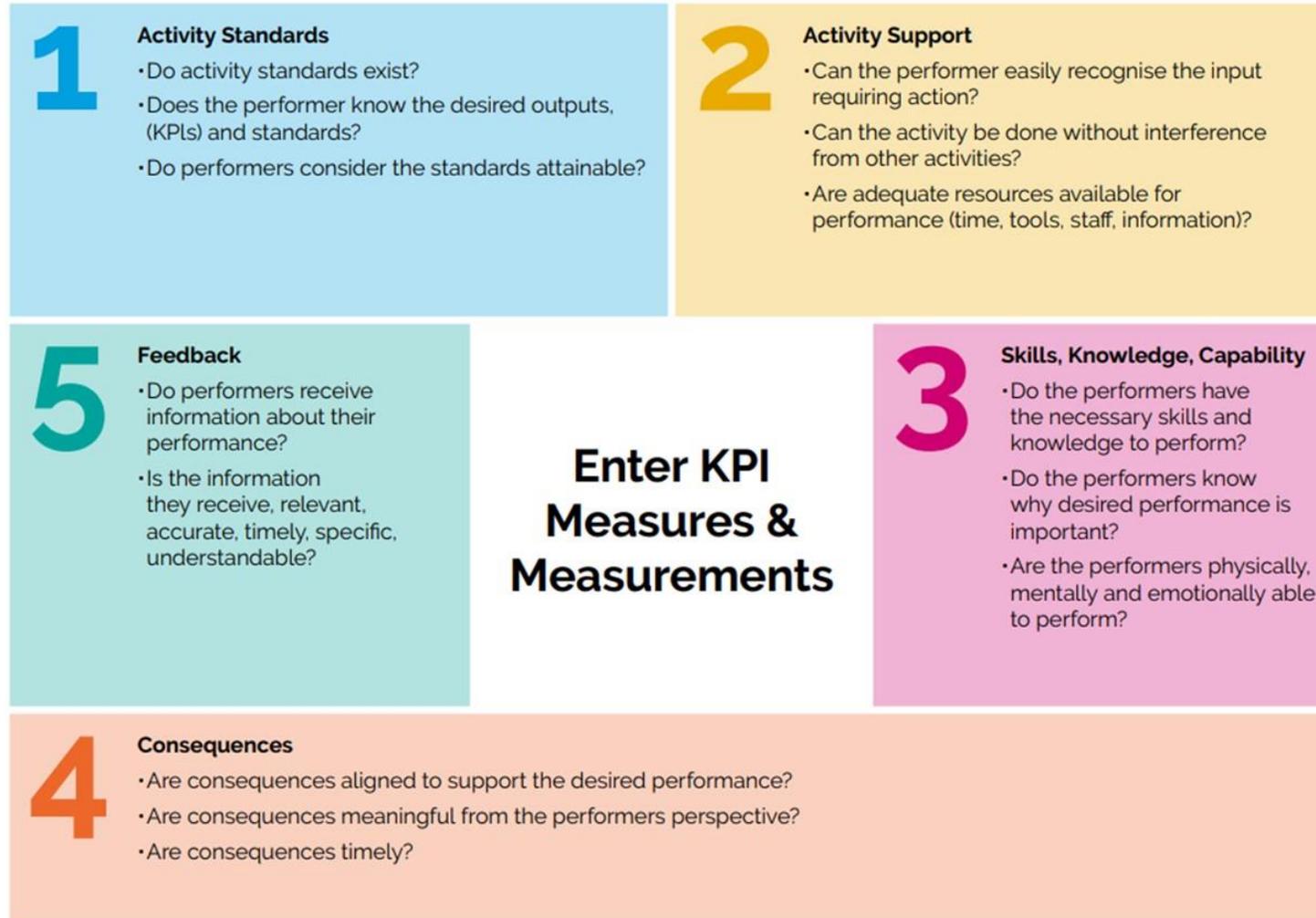
4.7 Produce your own SROI impact map.

The Excel example spreadsheet for the SROI Impact Map can be downloaded from the SROI Network, then adapted and tailored to present your Business Case and Realising Digital Value / Benefits Realisation Plan, as well as used for forecasting purposes and sensitivity 'what-if' analysis.

<https://www.socialvalueuk.org/resource/blank-value-map/>

Review and evaluate digital application project results

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4.8 Review your Performance Management Measures, Measurement, Processes, Skills, Competencies and Reward Structures

Realising Digital Value *Stage Five*

Identify Potential for Further Digital Applications, Projects
& Value

Identify Potential for Further Digital Applications, Projects & Value

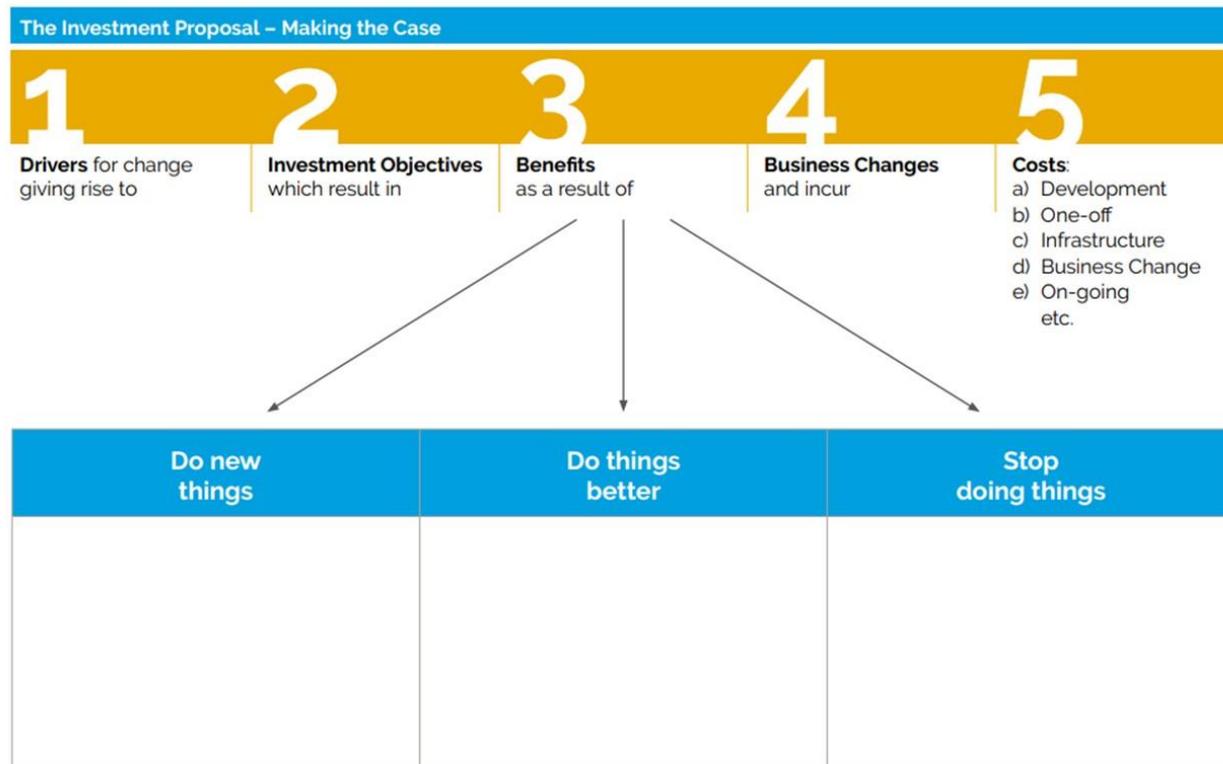
1. Identify & define digital opportunities and structure problems
2. Plan realisation of digital value & management
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5.1 Make the Business Case for Change and Future Benefits

Example of Benefits for an NHS Nurse Rostering Application

Structuring benefits - eRostering

Degree of Explicitness	Do New Things	Do Things Better	Stop Doing Things
Financial		£500K cost reduction in temporary staffing costs (Spend on bank shifts and agency shifts per roster)	£500K cost reduction in temporary staffing costs (removal of unused contracted hours)
Quantifiable		forecast cost reduction of 1.5 whole time equivalent based on supplier's pilot analysis	
Measurable		more productive use of staff (substantive staff hours utilised and % of shifts filled by temporary staff)	Improved Payroll accuracy (% of staff paid incorrectly or number of payroll queries)
Observable	Easier access to workforce information (ability to identify trends in data)	Improved flexible working (observation of work/life balance) Reduction in time on admin tasks (time released from ward manager's day)	



Identify Potential for Further Digital Applications, Projects & Value

Simplify your Systems and Eliminate unnecessary activities and processes: The ESIA template

1. Identify & define digital opportunities and structure problems
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Simplify your Systems before you Integrate and Automate			
Eliminate	Simplify	Integrate	Automate
<p>Overproduction Waiting time Transport Processing Inventory Defects/failures Duplication Reformatting Inspection Reconciling</p>	<p>Forms Procedures Processes Activities Communications Technology Use WorkFlows</p>	<p>Jobs Teams Clinicians Healthcare Professionals Administration</p>	<p>Dirty activities Difficult activities Dangerous activities Boring activities Data capture Data transfer Data analysis Decision Making Knowledge Sources</p>

5.2 Copy, contextualise and complete the ESIA Template and evaluate how your Digital Application maps on to these criteria

Click on the Tool to Download a Blank Template For ESIA



Identify Potential for Further Digital Applications, Projects & Value

- **Business Drivers**
 - External
 - Internal
- **Investment Objective**
 - To simplify and automate all business transactions
 - To integrate key processes and systems
 - To improve financial control of business assets and resources
- **Benefits**
- **Project Costs**
 - Hardware, software, consultants, internal systems development, configuration, infrastructure upgrades, business change, training, hosting, maintenance
- **Financial Project Return**
- **Risk Analysis**
 - Technical
 - Financial
 - Organisational
 - Ethical

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5.3 Integrate your RDV plan and Develop your Business Case.

There is a plethora of free and very useful guides, resources and workbooks that can be found online from private, public and government sectors. A little bit of 'Googling' is a worthwhile endeavour to save a lot of time in developing your own business case.

A very useful and comprehensive online resource with free access is provided by Solution Matrix Ltd for understanding Benefits and value for developing your business case. Click on the link below.

<https://www.business-case-analysis.com/business-benefit.html>

APPENDIX - 1

Help and Definitions

- Academic Support** Support is being provided by Dr Rebecca Casey, who is the lead Academic for this project, based at Newcastle University Business School, Newcastle upon Tyne. www.ncl.ac.uk/business-school She can be contacted by email: rebecca.casey@ncl.ac.uk and by phone: +44(0)191 2086179. This workbook is a direct output from a Pioneer Award, as part of the Health and Social Sciences Research Institute small grant awards scheme (2020/2022).
- Consultancy Support** Professor David Wainwright has provided additional consultancy support for the development of the workbook. He is available for ongoing consultancy advice and support of the workbook and Digital health application design and development. Dr Wainwright is an Emeritus Professor of Information Systems at the Newcastle Business School, Northumbria University at Newcastle upon Tyne, and now runs his own Sociotechnical Design consultancy. www.sociotechnical-design.co.uk . He can be contacted by email: david.wainwright@blueyonder.co.uk
- Do I need to follow the toolkit?** The toolkit is initially aimed at designers and developers of Open Source digital healthcare applications. It is a generic product and process that may be used by any IT or Digital applications development team involved with developing a case for support, and a business case to justify investment and resources for technology development, implementation and sustainable deployment. It is envisaged that this can be used to develop an evidence-base for sustainable digital technology investments that provide significant and measurable benefits for healthcare professionals, patients, clients and stakeholders.
- Structure** The toolkit is structured around 5 key steps. However, this structure is not rigid. The key is that the areas highlighted in these steps are considered and taken into account with the key stakeholders concerned. If this is not the case then this should be justified. The steps may be undertaken in any order if this better suits the problem context and evolving development of the project. Each step does relate to each other, moving forwards to developing a robust and sustainable business case for developing the proposed prototype solution into a working pilot project and then a fully developed product solution that is sustainable in the longer term.
- Additional Resources** Links are provided throughout the workbook to additional support materials, further reading, re-usable templates, business case and relevant workbooks, academic literature and web-based internet resources. Click on the links and explore !

Value Realisation

The identification and planning of value. Value is a complex, subjective and socially constructed phenomena that can only be interpreted within a defined context. Like benefits, it may be defined as ‘an advantage on behalf of a particular stakeholder or groups of stakeholders’. It may consist of many elements comprising but not limited to: Social Value; Personal Value; Financial Value; Economic Value; Strategic Value; Relationship Value; Knowledge Value; Technology Value; and Digital Value. Value can also be perceived as either being Extrinsic or Intrinsic (Value to others, or value to self, leading to the fulfilment of an interest).

Value Streams and Processes

A more ‘classical’ view of business value is used within the Project Management, Operations Management and IT industries. These provide models for defining value streams and processes associated with business models or service dominant logic – aimed at creating financial gains, increased market share, cost and efficiency savings in critical business processes. Value streams and processes are associated with the activities and workflows, controls and procedures needed to co-create and achieve stakeholder objectives.

Digital Transformation

Digital transformation entails considering how products, processes and organisations can be changed through the use of new, digital technologies. Digital transformation can be seen as a socio-technical programme. [Digital transformation – Wikipedia](#)

Digital Health

Digital health is a discipline that includes digital care programs, technologies with health, healthcare, living, and society to enhance the efficiency of healthcare delivery and to make medicine more personalized and precise. It uses information and communication technologies to facilitate understanding of health problems and challenges faced by people receiving medical treatment and social prescribing in more personalised and precise ways. [Digital health – Wikipedia](#)

Digital Business

Digital business is the creation of new business designs by blurring the digital and physical worlds. www.gartner.com
Digital business is about the creation of new business designs by blurring the physical and digital world. It is about the interaction and negotiations between, business, and things. www.forbes.com

The Internet of Things

The Internet of Things (IoT) plays a crucial role in a digital business, but it is much more than this. The Internet of Things as, Gartner defines it, is the network of physical objects that contain embedded technology to communicate and interact with their internal states or the external environment. www.forbes.com

Definitions

Benefits Realisation	The identification and planning of benefits. A business benefit is defined as 'an advantage on behalf of a particular stakeholder or groups of stakeholders'. This implies that the benefits are 'owned' by the stakeholders who want to obtain value from the investment.
Stakeholders	Stakeholders can be defined as individuals who stand to benefit from the investment or may be involved in making or affected by the changes required to realise the benefits.
Benefits Measurement	For each benefit it is important to identify where in the organisation it will occur in order to determine how it can be measured and who should be responsible for its delivery. If a benefit can neither be measured nor owned (ownership may be shared) then it does not really exist.
Business and Organizational Drivers	Views held by senior managers as to what is important to the business – in a given timescale – such that they feel changes must occur. Drivers for change can be both external and internal, but are specific to the context in which the organization operates.
Investment Objectives	Organizational targets for achievement agreed for the investment in relation to the drivers. As a set they are essentially a description of what the situation should be on completion of the investment.
Business Benefit	An advantage on behalf of a particular stakeholder or group of stakeholders.
Business Changes	The new ways of working that are required to ensure that the desired benefits are realised.
Enabling Changes	Changes that are the prerequisites for achieving the business changes or that are essential to bring the system into effective operation within the organisation.

Definitions

In economics, economic value is a measure of the benefit provided by a good or service to an economic agent. It is generally measured relative to units of currency, and the interpretation is therefore "what is the maximum amount of money a specific actor is willing and able to pay for the good or service"? For further information look up: [Economics – Wikipedia](#)

Economy, efficiency and effectiveness, often referred to as the "Three Es", may be used as complementary factors contributing to an assessment of the value for money provided by a purchase, project or activity. The UK National Audit Office uses the following summaries to explain the meaning of each term:

- Economy: minimising the cost of resources used or required (inputs) – spending less;
- Efficiency: the relationship between the output from goods or services and the resources to produce them – spending well; and
- Effectiveness: the relationship between the intended and actual results of public spending (outcomes) – spending wisely.

Social Value

Social return on investment (SROI) is a principles-based method for measuring extra-financial value (such as environmental or social value not currently reflected or involved in conventional financial accounts). It can be used by any entity to evaluate impact on stakeholders, identify ways to improve performance, and enhance the performance of investments.

The SROI method as it has been standardized by Social Value UK provides a consistent quantitative approach to understanding and managing the impacts of a project, business, organisation, fund or policy. It accounts for stakeholders' views of impact, and puts financial 'proxy' values on all those impacts identified by stakeholders which do not typically have market values. The aim is to include the values of people that are often excluded from markets in the same terms as used in markets, that is money, in order to give people a voice in resource allocation decisions.

Some SROI users employ a version of the method that does not require that all impacts be assigned a financial proxy. Instead the "numerator" includes monetized, quantitative but not monetized, qualitative, and narrative types of information about value.

https://en.wikipedia.org/wiki/Social_return_on_investment

The Public Services (Social Value) Act 2012 is an Act of the Parliament of the United Kingdom. The Act calls for all public sector commissioning to factor in ("have regard to") economic, social and environmental well-being in connection with public services contracts; and for connected purposes. It requires that all public bodies in England and Wales, including Local Authorities, and NHS organisations to consider how the services they commission and procure which are expected to cost more than the thresholds provided for in the Public Contracts Regulations might improve the social, economic and environmental well-being of the area.

[https://en.wikipedia.org/wiki/Public_Services_\(Social_Value\)_Act_2012](https://en.wikipedia.org/wiki/Public_Services_(Social_Value)_Act_2012)

Definitions

Cultural Value

A "functional" culture is a positive culture that contributes to an organisation's performance and success. A "dysfunctional" culture is one that hampers or negatively affects an organisation's performance and success. Organisational culture is reflected in the way people perform tasks, set objectives, and administer the necessary resources to achieve objectives. Culture affects the way individuals make decisions, feel, and act in response to the opportunities and threats affecting the organization.

A healthy and robust organisational culture may provide various sources of value and benefits, including the following:

- Competitive edge and performance excellence derived from innovation and customer service
- Consistent, efficient employee performance; job retention, diversity, learning, equal opportunities
- Team cohesiveness and knowledge sharing, leadership and training
- High employee morale, creativity and productivity, communication between all stakeholders
- Strong organisational alignment towards goal achievement, people focus and empowerment

Ethical Value

In ethics, value denotes the degree of importance of some thing or action, with the aim of determining what actions are best to do or what way is best to live. Values can be defined as broad preferences concerning appropriate courses of actions or outcomes. As such, values reflect a person's sense of right and wrong or what "ought" to be. Values tend to influence attitudes and behaviour and these types include ethical/moral values, doctrinal/ideological (religious, political) values, social values, and aesthetic values.

Personal values exist in relation to cultural values, either in agreement with or divergence from prevailing norms. A culture is a social system that shares a set of common values, in which such values permit social expectations and collective understandings of the good, beautiful and constructive.

APPENDIX – 2

Sources of Information, Downloads and Further Reading about Realising Digital Value and Benefits Realisation

Overview Documents

UK Government: Infrastructure and Projects Authority website. To download, click on the Tool.



Benefit Type	Description	Definition (from existing literature)
Monetary benefit	By use of digital value, users can... (text partially obscured)	Benefit is defined as any... (text partially obscured)
Non-monetary benefit	The extent of performance is... (text partially obscured)	Benefit is defined as any... (text partially obscured)
Qualitative benefit	Subjective evidence such as... (text partially obscured)	Benefit is defined as any... (text partially obscured)
Perceived benefit	As a result of... (text partially obscured)	Benefit is defined as any... (text partially obscured)

Guide for Effective Benefits Management in Major Projects Key benefits management principles and activities for major projects (2017)



Benefit Type	Description	Definition (from existing literature)
Monetary benefit	By use of digital value, users can... (text partially obscured)	Benefit is defined as any... (text partially obscured)
Non-monetary benefit	The extent of performance is... (text partially obscured)	Benefit is defined as any... (text partially obscured)
Qualitative benefit	Subjective evidence such as... (text partially obscured)	Benefit is defined as any... (text partially obscured)
Perceived benefit	As a result of... (text partially obscured)	Benefit is defined as any... (text partially obscured)

Click on the Tool to download the Guide Here (Free to use under UK Open Gov Licence)

Overview Documents

Some Further Reading

Short Overviews and further reading for Benefits & Value Management can be downloaded from the Association of Project Management or from the links provided here.

[Benefits Management Lifecycle | APM](#)

[Designing an effective survey on benefits and value management \(apm.org.uk\)](#)

Breese, R., Jenner, S., Serra, C. E. M., & Thorp, J. (2015). Benefits management: Lost or found in translation. *International Journal of Project Management*, 33(7), 1438-1451.

Waring, T., Casey, R., & Robson, A. (2018). Benefits realisation from IT-enabled innovation: A capability challenge for NHS English acute hospital trusts?. *Information Technology & People*, 31(3), 618-645.

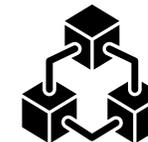
Minney, H., & Parris, J. (2019) A guide to using a benefits management framework, published by: www.apm.org.uk

A Practitioner’s Brief Guide to Benefits Management by Dr Rebecca Casey and Neil White, Association of Project Management (APM).



Benefit Type	Definition	Examples from a training business
Operational benefit	By use of agreed criteria, specific measurements are made, based on the objectives of the project, to assess the benefit realised.	To measure what benefits have been realised from a project and to compare them with the expected benefits.
Financial benefit	Being measured in monetary terms, the benefit is quantifiable and can be used to compare the benefits realised with the benefits expected. The benefits are measured in terms of the number of additional staff, the number of additional courses, etc.	Being able to measure the financial benefit of a project, such as the number of additional staff, the number of additional courses, etc.
Strategic benefit	Subject to agreed criteria, the benefits are measured in terms of the number of additional staff, the number of additional courses, etc.	Being able to measure the strategic benefit of a project, such as the number of additional staff, the number of additional courses, etc.
Intangible benefit	Being measured in terms of the number of additional staff, the number of additional courses, etc.	Being able to measure the intangible benefit of a project, such as the number of additional staff, the number of additional courses, etc.

Summary Diagram of Benefits Management (APM)



BRM Roles and Responsibilities

The example table sets out the key roles and responsibilities in the Benefit Management process for each Project.



Benefit Realisation Role	Responsibility	Named Individual (indicate Role)
Senior Responsible Owner	<ul style="list-style-type: none"> Ensures that the Project and the business areas affected maintain a focus on benefits delivery Chairs benefits reviews involving relevant stakeholders, business managers and possibly internal audits Authorises benefits achievements 	
Project Manager	<ul style="list-style-type: none"> Develops the Benefits Realisation Plan and Business Case in consultation with the Business Change Managers, relevant stakeholders and members of the Project teams Initiates benefits reviews as part of the Benefits Realisation Plan or in response to other triggers Work with PPD to enter and validate benefits data entered onto Profiling Tool 	
Business Change Manager	<ul style="list-style-type: none"> Provides information to support the creation and delivery of the Benefits Realisation Plan Develops and maintains the Benefits Profiles Ensures there is no double counting of benefits Ensures the implementation and embedding of the new capabilities are delivered by the Project Initiates benefits review after the Project has closed Work with PPD to enter and validate benefits data entered onto Benefits Profiling Tool. 	
Project Management Office	<ul style="list-style-type: none"> Monitors the progress of benefits realisation against the plan Produce performance reports as defined by the Project Manager Maintains benefits information under change control and maintains audit trails of changes 	
Benefits Recipient	<ul style="list-style-type: none"> Agrees the Benefit Profile prepared by the Business Change Manager Agrees criteria for delivery of benefit(s) and signs off against this criteria on delivery of benefit(s) 	
Benefit Owner	<ul style="list-style-type: none"> Agrees the Benefit Profile prepared by the Business Change Manager Monitors the successful delivery of enabling business changes Collects and reports data to evidence the realisation of benefits 	