

Guidance Document

G1239 Benefits Management Plan User Guide

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MAYOR OF LONDON

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This document could be used to provide guidance when populating the Benefits Management Plan (BMP).

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Neither London Underground nor Suppliers are bound to provide any of the items or services or follow any processes described in this document unless they are also required to provide them explicitly by other, Contractually binding, documents.

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1 Purpose

- 1.1 The purpose of this guidance is to assist with the population of the Benefits Management Plan.

2 Scope

- 2.1 This Guidance applies to the Benefits Management Plan. The PMF Product Description of which can be found in the PMF Product Matrix.

3 Guidance

3.1 Introduction

- 3.1.1 The aim of the Benefits Management Plan (BMP) is to identify a project's forecasted benefits and define how they will be measured and reported at each Gate. This will enable benefits to be tracked throughout the project's lifecycle, and effective Benefits Realisation can then take place.

Where the investment justification for a project is made at programme level or for a group of projects then the BMP should be written at the same level.

The BMP must be updated and submitted to the Benefits Manager [Ben Hennessy](#) at each PMF Gate.

This document is designed to guide you through the various sections of the BMP.

If you require any support, guidance or assistance populating the Benefits Management Plan please contact the Benefits Manager [Ben Hennessy](#) on Ext: 43527



3.2 Gateways

3.2.1 Gate 1 – Outcome Definition

Gate 2 – Feasibility

Gate 3 – Concept Design

Gate 4 – Detailed Design

Gate 5 – Delivery

Gate 6 – Project Close

Gate 7 – Benefits Realisation

3.3 Table of Contents

3.3.1 The Table of Contents displays the various worksheets that make up the Benefits Management Plan. Next to each item is a brief description detailing the purpose of each worksheet.

London Underground - Benefits Management Plan
Table of Contents

NAME (Links to Spreadsheet)	DESCRIPTION/ INFO
INPUTS	
INPUT - GATE 1 (Gate-1)	➤ Contains the required input for Gate 1. (Forecasted Benefit Data)
INPUT - GATE 2 (Gate-2)	➤ Contains the required input for Gate 2. (Forecasted Benefit Data)
INPUT - GATE 3 (Gate-3)	➤ Contains the required input for Gate 3. (Forecasted Benefit Data)
INPUT - GATE 4 (Gate-4)	➤ Contains the required input for Gate 4. (Forecasted Benefit Data)
INPUT - GATE 5 (Gate-5)	➤ Contains the required input for Gate 5. (Forecasted Benefit Data)
INPUT - GATE 6 (Gate-6)	➤ Contains the required input for Gate 6. (Forecasted Benefit Data)
INPUT - GATE 7 (Gate-7)	➤ Contains the required input for Gate 7 (Realised Benefit Data)
SUPPORTING INFO SHEET	➤ Contains Supporting Information Template
SUBGATE TEMPLATE	➤ This template should only be used when a project has to return through a previously passed gate. This could be due to more money or more time being requested.
OUTPUTS	
BENEFITS PROFILE	➤ Summarises the key benefits data at Gates
GATE COMPARISON	➤ Compares key benefits data with previous gate

The worksheets are split into 2 categories:

Inputs

These are worksheets that require the input of data.

Outputs

These are worksheets that pull out information from the inputs. These require no additional information to be added as they are linked directly to the input sheets.



3.4 Menu

- 3.4.1 The Menu tab provides an easy way to navigate around the BMP through a series of links. Each page, links back to the menu so you can always navigate back to this page.

London Underground - Benefits Management Plan	MENU
<u>Input - Gate 1</u>	
<u>Input - Gate 2</u>	
<u>Input - Gate 3</u>	
<u>Input - Gate 4</u>	
<u>Input - Gate 5</u>	
<u>Input - Gate 6</u>	
<u>Input - Gate 7</u>	
<u>Input - Supporting Info Sheet</u>	
<u>Benefits Profile</u>	
<u>Gate Comparison</u>	
<u>Mayor's Transport Strategy Goals, Challenges and Outcomes</u>	

3.5 Input Sheets

- 3.5.1 Types



The Benefits Management Plan consists of a series of benefits questions that must be answered before a project can enter a LU Gate.

There are three types of Input Sheet:

- a. Input – Gate Sheet
- b. Supporting Info Sheet
- c. Benefits Realisation Review Template (only to be completed at Gate 7)

3.5.2 Input - Gate Sheets

Theses contain benefits questions set in an individual Input sheet for each gate.

If the project is entering the Delivery Gate (Gate 4) then the questions in the Input - Gate 4 sheet must be answered (see page 7).