BCS Professional Certificate in Benefits Planning and Realisation Syllabus

Version 2.0
December 2023

This profession certification is not regulated by the following United Kingdom Regulators - Ofqual, Qualification in Wales, CCEA or SQA

BCS Professional Certificate in Benefits Planning and Realisation

Contents

Change History

Any changes made to the syllabus shall be clearly documented with a change history log. This shall include the latest version number, date of the amendment and changes made. The purpose is to identify quickly what changes have been made.

Version Number	Changes Made
V2.0 Sept 2023	Syllabus learning objective 4.7 updated to include the Agile lifecycle for a business case
V1.4 June 2023	Link to Reasonable Adjustments Policy updated. Business Analysis 3rd edition updated to 4th edition.
V1.3 Dec 2016	Strapline regarding regulated statement has been added.
V1.2 July 2016	Change to pass mark
V1.1 May 2016	Question Weighting updated
V1.0 October 2015	Syllabus created

Introduction

The BCS Professional Certificate in Benefits Planning and Realisation assesses knowledge and understanding of the lifecycle, activities and techniques used in the definition, planning and realisation of business benefits. These benefits are predicted to result from the introduction of business and information system changes. Understanding how to manage benefits in order to enable their realisation is critical for business analysts working in all aspects of the business change lifecycle.

Assessment Objectives

The examination leading to the BCS Professional Certificate in Benefits Planning and Realisation has the following assessment objectives.

Candidates must be able to demonstrate that they can:

- Recognise the context for benefits management
- Define a benefits management process
- Identify organisational drivers and business benefits
- Construct a benefits dependency network
- Build a business case and classify business benefits
- Undertake an investment appraisal
- Recognise the need for stakeholder and change management
- Explain the tasks required in implementing a benefits management approach
- Predict future issues in benefits management

Target Audience

This certification is relevant for anyone wishing to gain an understanding of the process and techniques used to plan, manage, and realise business benefits predicted to results from business change initiatives. The certification is particularly relevant for business analysts, project managers, programme managers and business managers.

Eligibility for the Examination

There are no pre-requisites for sitting this examination although candidates should be prepared to be assessed in line with the objectives listed in the previous section. While not compulsory, it is recommended that candidates attend a BCS accredited training course.

Duration and Format of the Examination

Type	40 Multiple Choice Questions
Duration	90 minutes
Pre-requisites	Accredited training is strongly recommended but is not a prerequisite
Supervised	Yes
Open Book	No (no materials can be taken into the examination room)
Pass Mark	26/40 (65%)
Calculators	On screen calculators can be used during this examination. No other calculators or mobile technology will be allowed.
Delivery	Online examination

Adjustments and/or additional time can be requested in line with the BCS Reasonable Adjustments Policy for candidates with a disability or other special considerations.

If the examination is taken in a language that is not the candidate's native / official language then they are entitled to 25% extra time.

If the examination is taken in a language that is not the candidate's native / official language then they are entitled to use their own paper language dictionary (whose purpose is translation between the examination language and another national language) during the examination. Electronic versions of dictionaries will not be allowed into the examination room.

Syllabus

For each top-level area of the syllabus a percentage and K level is identified. The percentage is the exam coverage of that area, and the K level identifies the maximum level of knowledge that may be examined for that area.

1. **The context of benefits management (10%, K4)**

    1.1. Issues with the relationship of IS/IT delivery to benefits

    1.2. Dissatisfaction with current approaches to benefits delivery

    1.3. The characteristics of a benefits management approach

    1.4. Focusing on value and value networks

    1.5. Value chains and value networks
    - External value chain analysis
    - Internal value chain analysis
    - Alternative value change configurations

2. **The benefits management process (10%, K4)**

    2.1. The rationale for benefits management

    2.2. The origins of the benefits management approach and process

    2.3. An overview of the benefits management process
    - Identifying and structuring benefits
    - Planning benefits realisation
    - Executing the benefits plan
    - Reviewing and evaluating the results

3. **Identifying drivers, benefits and establishing a benefits dependency network (30%, K4)**

    3.1. Why: identifying business and organisational drivers

    3.2. Establishing investments objectives

    3.3. Linking business benefits to drivers

    3.4. What: the business benefits

    - Benefit owners
    - Change owners

    3.5. How: the benefits dependency network

    - Business changes
    - Enabling changes
    - IS/IT enablers

    3.6. Measurements and ownership

    3.7. Benefits and change template

4. Building the business case (25%, K4)

4.1. The rationale of the business case

4.2. A structure for analysing and describing benefits

- Observable benefits
- Measurable benefits
- Quantifiable benefits
- Financial benefits

4.3. Quantifying the benefits

- Overcoming the measurable to quantifiable barrier

4.4. Financial benefits

- Cost reductions
- Revenue increases

4.5. Investment appraisal

- Payback
- Net present value
- Internal rate of return

4.6. Risk Assessment

4.7. Managing the business case

- Linear lifecycle of a business case
- Agile lifecycle of a business case

5. Stakeholders and change management (7.5%, K4)

5.1. Assessing the feasibility of achieving the benefit

5.2. Stakeholder analysis and management techniques

- Power and influence
- Benefits and change

5.3. From stakeholder analysis to stakeholder management action

5.4. Completing the benefits plan

5.5. Approaches to managing change

5.6. Matching management approach with stakeholder behaviours

5.7. Change management strategies

6. Implementing a benefits management approach (15%, K4)

6.1. Rationales for introducing benefits management

6.2. Initiating and managing a benefits driven project

6.3. Roles within benefits management

- The project sponsor
- The business project manager
- The project management office

6.4. Benefits management workshops

6.5. The benefits plan and the project plan

6.6. Reviewing and evaluating results

- Benefits review meeting

6.7. Establishing potential for further benefits

6.8. Monitoring benefits after implementation

6.9. A maturity model for organisational benefits

7. The future of benefits management (2.5%, K4)

7.1. Characteristics of the benefits management approach

7.2. Using benefits management to formulate and implement strategy

7.3. Incorporating benefits management into strategic thinking

7.4. Future trends in IS/IT and their implications for benefits management

Levels of Knowledge / SFIA Levels / Blooms

This course will provide candidates with the levels of difficulty / knowledge skill highlighted within the following table, enabling them to develop the skills to operate at the levels of responsibility indicated. The levels of knowledge and SFIA levels are explained in on the website www.bcs.org/levels. The levels of knowledge above will enable candidates to develop the following levels of skill to be able to operate at the following levels of responsibility (as defined within the SFIA framework) within their workplace:

Level	Levels of Knowledge	Levels of Skill and Responsibility
K7		Set strategy, inspire and mobilise
K6	Evaluate	Initiate and influence
K5	Synthesise	Ensure and advise
K4	Analyse	Enable
K3	Apply	Apply
K2	Understand	Assist
K1	Remember	Follow

Question Weighting

Each major subject heading in this syllabus is assigned a percentage weighting. The purpose of this is:
1) Guidance on the proportion of content allocated to each topic area of an accredited course.
2) Guidance on the proportion of questions in the exam.

Syllabus Area	Questions & Syllabus Weighting
1 – The Context of Benefits Management	4 (10%)
2 – The Benefits Management Process	4 (10%)
3 – Identifying Drivers, Benefits and Establishing a Benefits Dependency Network	12 (30%)
4 – Building the Business Case	10 (25%)
5 – Stakeholders and Change Management	3 (7.5%)
6 – Implementing a Benefits Management Approach	6 (15%)
7 – The Future of Benefits Management	1 (2.5%)
Total	**40 (100%)**

Recommended Reading List

Title	Benefits Management: How to Increase the Business Value of IT Projects
Author	John Ward and Elizabeth Daniel
Publisher	John Wiley and Sons
Publication Date	September 2012
ISBN	978 1119993261

This book contains all the required learning material except for the following:

- The definition of a value proposition (see the Business Analysis book below)
- The detailed numerical analysis of payback, net present value and internal rate of return (see the Finance for IT Decision Makers book below)

Title	Business Analysis 4th Edition
Author	Debra Paul, Donald Yeates and James Cadle
Publisher	BCS, Learning and Development Limited
Publication Date	July 2020
ISBN	978 1780175102

Title	Finance for IT Decision Makers
Author	Michael Blackstaff
Publisher	BCS, Learning and Development Limited
Publication Date	September 2012
ISBN	978 1780171227