



BCS Professional Certificate in Benefits Planning and Realisation Syllabus

**Version 1.4
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This profession certification is not regulated by the following United Kingdom Regulators - Ofqual, Qualification in Wales, CCEA or SQA

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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 |
|------------------------------|---|
| Version 1.4 June 2023 | Link to Reasonable Adjustments Policy updated. Business Analysis 3rd edition updated to 4th edition. |
| Version 1.3 December 2016 | Strapline regarding regulated statement has been added. |
| Version 1.2 July 2016 | Change to pass mark. |
| Version 1.1 May 2016 | Question Weighting updated. |
| Version 1.0 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 result 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

The format for the examination is a 90 minute examination. It consists of 40 multiple-choice questions. The examination is closed book i.e. no materials can be taken into the examination room. The pass mark is 26/40 (65%)

Additional time for candidates requiring Reasonable Adjustments

Candidates may request additional time if they require reasonable adjustments. Please refer to the [reasonable adjustments policy](#) for detailed information on how and when to apply.

Additional time for candidates whose native language is not that of the examination

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.

Calculators

Simple non-programmable calculators can be used during paper based examinations (to be provided by the candidate). Candidates taking on-line examinations will have access to an on screen calculator. No other calculators or mobile technology will be allowed.

Format of the Examination

| | |
|------------------|---|
| Type | 40 multiple choice questions |
| Duration | 1 Hour and 30 Minutes. Candidates are entitled to an additional 23 minutes if they are sitting an examination in a language that is not their native/official language. |
| Example Question | <p>Scenario: SDLC Council is proposing to close a community centre based in a former factory. It intends to sell this community centre for housing development and build a new community centre on land that it owns just over a mile from the current centre. The Council has identified income from the sale of the community centre and an improved meeting and learning environment as important benefits of the proposal.</p> <p>The various groups that use the current community centre acknowledge that there will be benefits from moving to the new centre but they are concerned about the longer journeys that many of their participants will have to make. The proposed new centre is on the periphery of the community it serves, while the current centre is in the middle. They are also concerned that rental charges for using the centre will also increase, making the centre uneconomic for them to use.</p> <p>The council is currently working with the user groups of the community centre to understand and resolve their concerns. It has already abandoned its original timescales for the closure of the current centre, allowing for a longer period of consultation about the user's concerns.</p> <p>Question: How would the benefit 'improve meeting and learning environment' be classified?</p> <p>A. As a financial benefit B. As a quantifiable benefit C. As a measurable benefit D. As an observable benefit</p> |
| Pre-requisites | Accredited training is strongly recommended but is not a pre-requisite |
| Supervised | Yes |
| Open Book | No |
| Pass Mark | 26/40 (65%) |
| Distinction Mark | None |
| Calculators | Calculators can be used during this examination |
| Delivery | Paper-based examination |

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 Completing the 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 (SFIA) |
|-------|---------------------|---|
| 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

| Syllabus Area | Target number of questions |
|--|----------------------------|
| 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 Questions |

Recommended Reading List

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|-------------------------|--|
| 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 and James Cadle |
| Publisher | BCS Learning & Development |
| Publication Date | 24 July 2020 |
| ISBN | Paperback: 13: 9781780175102 |

| | |
|-------------------------|--|
| Title | Finance for IT Decision Makers |
| Author | Michael Blackstaff |
| Publisher | BCS, Learning and Development Limited |
| Publication Date | September 2012 |
| ISBN | 9781780172774 |