**HOW TO USE THIS TEMPLATE:**

### Introduction

The template reflects the steps set out in the PRINCE2 Method and is designed to prompt the Project Manag­er and help in the creation of the Benefits Review Plan. There is also a Product Description for the Benefits Review Plan at Appendix A of the PRINCE2 Manual.

Loading the file

This template has been produced using Microsoft Word 2003. To use it, load up the file directly from the directory and starting from page 1 follow the prompts (in [...] brackets).

Deleting the [....] text

When the template is complete, the Benefits Review Plan document can be printed and ap­proved.

Prior to printing, you should delete all [....] prompt text.

Saving the Benefits Review Plan document under its own name

Save the Benefits Review Plan document by selecting the “SAVE-AS” command; this will avoid overwriting the standard template. You must specify your own Project Directory.

**Once your Benefits Review Plan is complete check the document against the following Quality Criteria:**

* Covers all benefits mentioned in the Business Case
* The benefits are measurable and baseline measures have been recorded
* Describes suitable timing for measurement of the benefits, together with reasons for the timing
* Identifies the skills or individuals who will be needed to carry out the measurements
* The effort and cost to undertake the benefits reviews is realistic when compared to the value of the anticipated benefits
* Consideration is given to whether dis-benefits should be measured and reviewed

PROJECT DOCUMENTATION

#### BENEFITS REVIEW PLAN

|  |  |
| --- | --- |
| **Project:** |  |
| Release: |  |
| Date: |  |
|  |  |
| **PRINCE2** |  |
|  |  |
| Author: |  |
| Owner: |  |
| Client: |  |
| Document Ref: |  |
| Version No: |  |

# 1 Benefits Review Plan History

## 1.1 Document Location

This document is only valid on the day it was printed.

The source of the document will be found at this location – *[insert folder structure]*

## 1.2 Revision History

**Date of this revision**:

**Date of next revision**:

|  |  |  |  |
| --- | --- | --- | --- |
| **Revision date** | **Previous revision date** | **Summary of Changes** | **Changes marked** |
|  |  | First issue |  |

## 1.3 Approvals

This document requires the following approvals.

Signed approval forms should be filed appropriately in the project filing system.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Name** | **Signature** | **Title** | **Date of Issue** | **Version** |
|  |  |  |  |  |

## 1.4 Distribution

This document has been distributed to:

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Title** | **Date of Issue** | **Version** |
|  |  |  |  |

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## 3 Scope

[The scope of the Benefits Review Plan covering what benefits are to be measured]

## 4 Accountability

[Who is accountable for the expected benefits?]

## 5 Benefits Measurement

[How to measure achievement of expected benefits, and when they can be measured]

## 6 Resources

[What resources are needed to carry out the review work?]

## 7 Baseline Measures

[Baseline measures from which the improvements will be calculated]

## 8 Performance Review

[How performance of the project product will be reviewed.]