APMG International

Managing Benefits

Syllabus

January 2024

1 Introduction

Managing Benefits provides managers and practitioners from multiple disciplines, working in a wide variety of organizations, with generally applicable guidance encompassing benefits management principles, practices and techniques that enable organizations to optimize the return from their investments in change.

Managing Benefits qualifications are offered at two levels: Foundation and Practitioner.

The primary purpose of the syllabus is to provide a basis for accreditation of people involved in a range of benefits management roles. It documents the learning outcomes related to the use of *Managing Benefits* and describes the requirements a candidate is expected to meet to demonstrate that these learning outcomes have been achieved at each qualification level.

The target audience for this document is:

- Exam Board
- Exam Panel
- APMG Assessment Team
- Accredited Training Organizations.

This syllabus informs the design of the exams and provides accredited training organizations with a more detailed breakdown of what the exams will assess. Details on the exam structure and content are documented in the *Managing Benefits* Foundation and Practitioner Designs.

2. Foundation Qualification

2.1 Purpose of the Foundation Qualification

The purpose of the Foundation qualification is to confirm that a candidate has sufficient knowledge and understanding of benefits management principles, practices and techniques to work effectively in a range of benefits management roles. The Foundation qualification is also a pre-requisite for the Practitioner qualification.

2.2 Target Audience

The target audience encompasses all those with an interest in ensuring the best use of taxpayers' and shareholders' funds by optimizing the benefits realized from change initiatives. This multi-disciplinary group includes:

- Senior executives, including Change and Transformation Directors, responsible for delivering value for money from the organization's investments in change and achieving the organization's strategic objectives

- Sponsors/Project Board Executives who play a leadership role on change initiatives

- Project and programme management (PPM) professionals responsible for delivering the change initiatives from which benefits are realized

- Portfolio managers and Portfolio Office staff responsible for managing the organization's portfolio of change initiatives – including optimizing the contribution to strategic objectives

- Business Case writers responsible for delivering reliable cases on which to base investment decisions

- Finance professionals and economists responsible for undertaking, or participating in, investment appraisal and portfolio prioritization reviews

- Business managers (including Benefit Owners) responsible for managing the operational functions by which, or within which, change initiatives are delivered and benefits are realized

- Change Managers and Benefits Managers responsible for managing business change and benefits realization

- Others with an interest in the successful delivery of change, including strategic planners, operational performance managers, internal and external auditors, procurement and commercial professionals etc.

2.3 High Level Performance Definition of a Successful Foundation Candidate

The Foundation level aims to measure whether a candidate understands the benefits management principles, practices, techniques, roles, responsibilities, and documents. Specifically to know and understand the:

- Definitions, scope and objectives of benefits management, barriers to its effective practice, and the key success characteristics
- Principles upon which successful approaches to benefits management are based
- Five practices contained within the Benefits Management Cycle and relevant techniques applicable to each practice
- Key elements of portfolio-based benefits management
- Scope of the key roles and responsibilities for benefits management and the typical contents of the main benefits management documentation
- Approaches to implementation and the factors to consider in sustaining progress.

3. Practitioner Qualification

3.1 Purpose of the Practitioner Qualification

The purpose of the Practitioner qualification is to confirm whether the candidate has achieved sufficient understanding of how to apply and tailor the *Managing Benefits* guidance in a scenario situation. A successful Practitioner candidate should, with suitable support, be able to advise on the implementation of appropriate practices and techniques, and apply these practices and techniques in a live organizational context, but may not be sufficiently skilled to do this appropriately for all situations. Their individual expertise, the complexity of the organizational context, and the support provided will also influence the impact the Practitioner can achieve.

3.2. Target Audience

This qualification is aimed at those involved in the selection and delivery of business change initiatives, as well as the realization of benefits from these initiatives including:

- Change leaders e.g. Sponsors, members of Management Boards and Directors of Change

- Change initiators e.g. strategic planners and policy leads

- Change appraisers and evaluators e.g. finance professionals and economists, business case writers, auditors and project appraisers

- Change implementers/enablers e.g. Portfolio, Programme and Project Managers

- Change support e.g. Portfolio, Programme and Project Office staff
- Change agents e.g. Change managers and Benefits Managers
- Benefit Owners and relevant operational line managers/staff.

3.3 High Level Performance Definition of a Successful Practitioner Candidate

The candidate should be able to apply and understand how to tailor *Managing Benefits* effectively. Specifically candidates should be able to demonstrate their ability to:

- Plan the implementation of benefits management, select appropriate strategies to sustain and measure progress
- Select and adapt the principles, practices and techniques to suit different organizational contexts
- Apply activities that should be undertaken during each of the practices of the Benefits Management Cycle together with the accountabilities and responsibilities of each of the defined roles
- Evaluate examples of benefits management information (documents)
- Analyse the solutions adopted in relation to a given scenario.

4. Learning Outcomes Assessment Model

A classification widely used when designing assessments for certification and education is the Bloom's Taxonomy of Educational Objectives. This classifies learning objectives into six ascending learning levels, each defining a higher degree of competencies and skills (Bloom et al, 1956, Taxonomy of Educational Objectives).

APMG have incorporated this into a Learning Outcomes Assessment Model which is used to provide a simple and systematic means for assessing and classifying the learning outcomes for APMG qualifications.

This structured approach helps to ensure:

- A clear delineation in learning level content between different qualification levels
- Learning outcomes are documented consistently across different areas of the guidance
- Exam questions and papers are consistent and are created to a similar level of difficulty.

The Foundation qualification examines learning outcomes at levels 1 (knowledge) and 2 (comprehension). The Practitioner qualification tests learning outcomes at levels 3 (application) and 4 (analysis).

Managing Benefits Learning Outcomes Assessment Model				
	1.Knowledge	**2. Comprehension**	**3. Application**	**4. Analysis**
Generic Definition from APMG Learning Outcomes Assessment Model	Know key facts, terms and concepts from the manual/guidance	Understand key concepts from the manual/guidance	Be able to apply key concepts relating to the syllabus area for a given scenario	Be able analyse and distinguish between appropriate and inappropriate use of the method/guidance for a given scenario situation
Qualification Learning Outcome Assessment Model	Know facts, including terms, principles, practices, techniques, documentation, roles and responsibilities from the *Managing Benefits* guidance.	Understand the terms, principles, practices, techniques, documentation, roles and responsibilities and can explain how these are applied in practice.	Be able to apply with appropriate tailoring, the principles, practices, techniques, documents, roles and responsibilities to suit the organizational context, and in particular: (i) design and apply appropriate strategies to implement, sustain and measure benefits management (ii) apply the benefits management principles appropriately (iii) determine appropriate use of benefits management practices and relevant techniques (iv) determine appropriate use of benefits management documentation and involvement of the relevant roles for a given scenario.	Be able to analyse and distinguish between appropriate and inappropriate application of the guidance through appraisal of the justification, planning, design, implementation and operation of benefits management for a given scenario.

5. Syllabus Areas

The syllabus is presented by syllabus areas. This is the unit of learning which may relate to a chapter from the manual/guidance or several concepts commonly grouped together in a training course module.

The following syllabus areas are identified.

Syllabus Area Code	Syllabus Area Title
OV	Overview
PR	Principles
IQ	Identify & Quantify
VA	Value & Appraise
PL	Plan
RZ	Realize
RW	Review
PF	Portfolio-based application
IS	Implement & Sustain

6. Syllabus Presentation

For each syllabus area learning outcomes for each learning level are identified. Each learning outcome is then supported by a description of the requirements that a candidate is expected to meet to demonstrate that the learning outcome has been achieved at the qualification level indicated. These are shown as syllabus topics.

All Foundation level requirements are assumed to have been met for Practitioner level and are not directly assessed again, although Foundation level knowledge and understanding will be used when demonstrating Practitioner application and analysis learning outcomes.

Each of the syllabus areas is presented in a similar format as follows:

Syllabus Area Code **PG [2]**		**Syllabus Area :** ***QUAL Syllabus Area* (XX) Theme** [1]	**Foundation**	**Practitioner**	**Primary References**
Level	Topic				
Know fact, terms and concepts relating to the *syllabus area*. [3] **Specifically to recall:**					
01 [4]	01 [5]	[6]	[7]		[8]
01	02				

Key to the Syllabus Area table

1	Syllabus Area	Unit of learning, e.g. chapter of the reference guide or course module.
2	Syllabus Area Code	A unique 2 character code identifying the syllabus area.
3	Learning Outcome (topic header shown in bold)	A statement of what a candidate will be expected to know, understand or do.
4	Level	Classification of the learning outcome against the APMG OTE Learning Outcomes Assessment Model.
5	Topic Reference	Number of the topic within the learning level.
6	Topic Description	Description of what is required of the candidate to demonstrate that a learning outcome has been achieved at the qualification level indicated
7	Foundation/Practitioner	Shows at which qualification level the topic is assessed. N.B A topic is only assessed at one qualification level.
8	Primary Reference	The main reference supporting the topic.

7. Important Points

The following points about the use of the syllabus should be noted.

Managing Benefits Guide References

The *Managing Benefits* guide references provided should be considered to be indicative rather than comprehensive, i.e. there may be other valid references within the guidance.

In practice, at Practitioner level, questions based on a syllabus topic may require and test knowledge of relevant material from other sections of the *Managing Benefits* guidance.

The references provided include sections (e.g. 4.7) and sub-sections (e.g. 4.3.4). Where a specific section is referenced, e.g. 4.9, this refers to that section only – it does not refer to its sub-section, e.g. 4.9.1 to 4.9.5. However, where a range of sections is referenced, e.g. 4.3 – 4.4, all sub-sections of the referenced sections are meant to be included.

8. Syllabus Exclusions

The content of the examples shown in *Managing Benefits* guide are not directly examinable, although the contents may be referenced to illustrate a relevant generic point.

Syllabus Area Code OV		Syllabus Area : **OVERVIEW**	Foundation	Practitioner	Primary References
Level	Topic				
Know key facts, including terms, principles, practices, techniques, documentation, main roles and responsibilities from the *Managing Benefits* Guide. **Specifically to recall:**					
01	01	The definitions of benefits, benefits management and related terms; and the objectives of benefits management.	✓		2.2, 2.3.2, 2.4-2.5
01	02	The Benefits Management Model. Specifically: 1. The relationship between the principles, practices and relevant techniques 2. The names of the five practices in the Benefits Management Cycle 3. The factors that will affect how the practices will be adapted.	✓		 1.5, 3.1 1.5, 4.2 1.5, 4.3.2
01	03	How value management relates to benefits management and the main value management techniques available.	✓		2.3.1-2, 6.4, 6.4.1-3
Understand the terms, principles, practices, techniques, documentation, roles and responsibilities and can explain how these are applied in practice. **Specifically to identify:**					
02	01	The barriers to efficient and effective benefits management and strategies to overcome them, including the Key Success Characteristics of benefits management.	✓		4.3.1-5, 4.4 Appendix D
02	02	The organizational context within which benefits management operates and the key functions and activities with which it needs to coordinate its activities.	✓		4.2
Be able to apply *and tailor* the terms, principles, practices, techniques, documentation, roles and responsibilities of *Managing Benefits* to a scenario. **Specifically to:**					
03	01	There are no level 3 topics for this syllabus area.*			
Be able to analyse and distinguish between appropriate and inappropriate application of the guidance through appraisal of the justification, planning, design, implementation and operation of *Managing Benefits* to a scenario. **Specifically to analyse with reasons whether:**					
04	01	There are no level 4 topics for this syllabus area.*			

* Overview topics are not specifically included at Practitioner level although they may be examined within the other relevant syllabus areas.

Syllabus Area Code PR		Syllabus Area : PRINCIPLES	Foundation	Practitioner	Primary References
Level	Topic				
Know key facts, including terms, principles, practices, techniques, documentation, roles and responsibilities from the *Managing Benefits* Guide. **Specifically to recall:**					
01	01	The names of the seven principles upon which effective benefits management is based.	✓		3.1
Understand the terms, principles, practices, techniques, documentation, roles and responsibilities and can explain how these are applied in practice. **Specifically to identify:**					
02	01	What is involved in relation to Principle 1: Align benefits with strategy.	✓		3.2, 3.2.1-3.2.2
02	02	What is involved in relation to Principle 2: Start with the end in mind.	✓		3.3
02	03	What is involved in relation to Principle 3: Utilize successful delivery methods.	✓		3.4
02	04	What is involved in relation to Principle 4: Integrate benefits with performance management.	✓		3.5, 3.5.1
02	05	What is involved in relation to Principle 6: Apply effective governance.	✓		3.7, 3.7.1-4
02	06	What is involved in relation to Principle 7: Develop a value culture.	✓		3.8
Be able to apply *and tailor* the terms, principles, practices, techniques, documentation, roles and responsibilities of *Managing Benefits* to a scenario. **Specifically to:**					
03	01	Identify appropriate applications of the benefits management Principles for a given scenario, including the approaches and techniques designed to: 1. Align benefits with strategy. 2. Apply benefits-led change (Start with the end in mind). 3. Ensure successful delivery. 4. Integrate benefits with the performance management system. 5. Apply effective governance. 6. Develop a value culture.		✓	3.2, 3.2.1-3.2.2 3.3 3.4 3.5, 3.5.1 3.7, 3.7.1-4 3.8
Be able to analyse and distinguish between appropriate and inappropriate application of the guidance through appraisal of the justification, planning, design, implementation and operation of benefits management to a given scenario. **Specifically to analyse with reasons whether:**					

Syllabus Area Code **PR**		**Syllabus Area :** **PRINCIPLES**	**Foundation**	**Practitioner**	**Primary References**
04	01	The approaches and techniques adopted are appropriate, with reasons, in a given scenario when: 1. Aligning benefits with strategy. 2. Applying benefits-led change (Start with the end in mind). 3. Ensuring successful delivery. 4. Integrating benefits with the performance management system. 5. Applying effective governance. 6. Developing a value culture.		✓	3.2, 3.2.1-3.2.2 3.3 3.4 3.5, 3.5.1 3.7, 3.7.1-4 3.8

Note
Principle 5 is covered under the Portfolio-based application (PF) syllabus area.

Syllabus Area Code **IQ**		**Syllabus Area :** **IDENTIFY & QUANTIFY**	**Foundation**	**Practitioner**	**Primary References**
Level	Topic				
Know key facts, including terms, principles, practices, techniques, documentation, roles and responsibilities from the *Managing Benefits* Guide. **Specifically to recall:**					
01	01	The objective and scope of the Identify and Quantify practice.	✓		5.1, 5.1.1
Understand the terms, principles, practices, techniques, documentation, roles and responsibilities and can explain how these are applied in practice. **Specifically to identify:**					
02	01	What is involved in identifying strategic drivers, investment objectives and benefits using benefits discovery workshops.	✓		5.2.1
02	02	What is involved in identifying benefits using benefits mapping.	✓		5.2.2, 5.2.2.1-4
02	03	What is involved in identifying benefits using customer insight.	✓		5.2.3
02	04	What is involved in quantifying/forecasting benefits, specifically: 1. The main problems faced in developing reliable benefits forecasts. 2. Solutions to the above.	✓		5.3 5.3.1, 5.3.2, Appendix D 5.3.3-5.3.5
Be able to apply *and tailor* the terms, principles, practices, techniques, documentation, roles and responsibilities of *Managing Benefits* to a scenario. **Specifically to:**					
03	01	Identify appropriate applications of the Identify and Quantify practice of the Benefits Management Cycle for a given scenario, including approaches and techniques designed to: 1. Identify strategic drivers and investment objectives. 2. Identify benefits using benefits discovery workshops. 3. Identify benefits using benefits mapping. 4. Identify benefits using customer insight. 5. Develop accurate and reliable benefits forecasts.		✓	5.2.1 5.2.1 5.2.2, 5.2.2.1-4 5.2.3 5.3, 5.3.1, 5.3.2, Appendix D 5.3.3-5.3.5

Syllabus Area Code IQ		Syllabus Area : **IDENTIFY & QUANTIFY**	Foundation	Practitioner	Primary References
Be able to analyse and distinguish between appropriate and inappropriate application of the guidance through appraisal of the justification, planning, design, implementation and operation of benefits management to a scenario. **Specifically to analyse with reasons whether:**					
04	01	The approaches and techniques adopted are appropriate, with reasons, in a given scenario when: 1. Identifying strategic drivers and investment objectives. 2. Identifying benefits using benefits discovery workshops. 3. Identifying benefits using benefits mapping. 4. Identifying benefits using customer insight. 5. Developing accurate and reliable benefits forecasts.		✓	5.2.1 5.2.1 5.2.2, 5.2.2.1-4 5.2.3 5.3, 5.3.1, 5.3.2, Appendix D 5.3.3-5.3.5

Syllabus Area Code VA		Syllabus Area : VALUE & APPRAISE	Foundation	Practitioner	Primary References
Level	Topic				
Know key facts, including terms, principles, practices, techniques, documentation, roles and responsibilities from the *Managing Benefits* Guide. **Specifically to recall:**					
01	01	The objective and scope of the Value and Appraise practice.	✓		6.1, 6.2.1
Understand the terms, principles, practices, techniques, documentation, roles and responsibilities and can explain how these are applied in practice. **Specifically to identify:**					
02	01	What is involved in valuing: 1. Financial benefits. 2. Efficiency improvements. 3. Non-financial benefits.	✓		6.2.2.1 6.2.2.2 6.2.2.3, Appendix A
02	02	What is involved in undertaking cost-benefit analysis.	✓		6.3.1, 6.3.1.1
02	03	What is involved in undertaking real options analysis.	✓		6.3.2
02	04	What is involved in undertaking cost-effectiveness analysis.	✓		6.3.3, 6.3.3.1
02	05	What is involved in undertaking multi-criteria analysis.	✓		6.3.4, Appendix A
Be able to apply *and tailor* the terms, principles, practices, techniques, documentation, roles and responsibilities of *Managing Benefits* to a scenario. **Specifically to:**					
03	01	Identify appropriate applications of the Value and Appraise practice of the Benefits Management Cycle for a given scenario, including approaches and techniques designed to: 1. Value financial benefits. 2. Value efficiency improvements. 3. Value non-financial benefits. 4. Appraise options and initiatives using cost-benefit analysis. 5. Appraise options and initiatives using real options analysis. 6. Appraise options and initiatives using cost-effectiveness analysis. 7. Appraise options and initiatives using multi-criteria analysis.		✓	6.2.2.1 6.2.2.2 6.2.2.3, Appendix A 6.3.1, 6.3.1.1 6.3.2 6.3.3, 6.3.3.1 6.3.4, Appendix A
Be able to analyse and distinguish between appropriate and inappropriate application of the guidance through appraisal of the justification, planning, design, implementation and operation of benefits management to a scenario. **Specifically to analyse with reasons whether:**					

Syllabus Area Code VA		Syllabus Area : VALUE & APPRAISE	Foundation	Practitioner	Primary References
04	01	The approaches and techniques adopted are appropriate, with reasons, in a given scenario when: 1. Valuing financial benefits. 2. Valuing efficiency improvements. 3. Valuing non-financial benefits. 4. Appraising options and initiatives using cost-benefit analysis. 5. Appraising options and initiatives using real options analysis. 6. Appraising options and initiatives using cost-effectiveness analysis. 7. Appraising options and initiatives using multi-criteria analysis.		✓	6.2.2.1 6.2.2.2 6.2.2.3, Appendix A 6.3.1, 6.3.1.1 6.3.2 6.3.3, 6.3.3.1 6.3.4, Appendix A

Syllabus Area Code PL		Syllabus Area : PLAN	Foundation	Practitioner	Primary References
Level	Topic				
Know key facts, including terms, principles, practices, techniques, documentation, roles and responsibilities from the *Managing Benefits* Guide. **Specifically to recall:**					
01	01	The objectives and scope of the Plan practice.	✓		7.1-7.2
Understand the terms, principles, practices, techniques, documentation, roles and responsibilities and can explain how these are applied in practice. **Specifically to identify:**					
02	01	What is involved in validating the benefits.	✓		7.3
02	02	What is involved in prioritizing the benefits.	✓		7.4
02	03	What is involved in managing pre-transition activity.	✓		7.5
02	04	What is involved in selecting appropriate benefit measures.	✓		7.6, 7.6.1-7
02	05	What is involved in managing benefit threats and opportunities.	✓		7.7, 7.7.1-2
02	06	What is involved in planning effective stakeholder engagement.	✓		7.8, 7.8.1
02	07	The main initiative-level benefits management documentation, including the Business Case, and their typical contents.	✓		4.5, 7.9, 7.9.1, Appendix B
02	08	The main initiative-level benefits management roles and their respective responsibilities.	✓		4.5, 7.9, Appendix C
Be able to apply *and tailor* the terms, principles, practices, techniques, documentation, roles and responsibilities of *Managing Benefits* to a scenario. **Specifically to:**					
03	01	Identify appropriate applications of the Plan practice of the Benefits Management Cycle for a given scenario, including approaches and techniques designed to: 1. Validate benefits. 2. Prioritize benefits. 3. Manage pre-transition activity. 4. Select benefit measures. 5. Manage benefit threats and opportunities. 6. Plan effective stakeholder engagement.		✓	7.3 7.4 7.5 7.6, 7.6.1-7 7.7, 7.7.1-2 7.8, 7.8.1

Syllabus Area Code PL		Syllabus Area : PLAN	Foundation	Practitioner	Primary References
03	02	Identify appropriate information, using typical contents, for inclusion in the relevant initiative-level benefits management documentation: 1. Benefits Management Strategy. 2. Benefits Realization Plan. 3. Benefit Profile. 4. The Business Case.		✓	4.5, 7.9, 7.9.1, Appendix B
03	03	Identify appropriate application of the main initiative-level benefits management roles: 1. Sponsor 2. Programme/Project Manager. 3. Benefit Owner. 4. Benefit Manager.		✓	4.5, 7.9, Appendix C
Be able to analyse and distinguish between appropriate and inappropriate application of the guidance through appraisal of the justification, planning, design, implementation and operation of benefits management to a scenario. **Specifically to analyse with reasons whether:**					
04	01	The approaches and techniques adopted are appropriate, with reasons, in a given scenario when: 1. Validating benefits. 2. Prioritizing benefits. 3. Managing pre-transition activity. 4. Selecting benefit measures. 5. Managing benefit threats and opportunities. 6. Planning effective stakeholder engagement.		✓	7.3 7.4 7.5 7.6, 7.6.1-7 7.7, 7.7.1-2 7.8, 7.8.1
04	02	The initiative-level benefits management documentation is fit for purpose, with reasons: 1. Benefits Management Strategy. 2. Benefits Realization Plan. 3. Benefit Profile. 4. The Business Case.		✓	4.5, 7.9, 7.9.1, Appendix B

Syllabus Area Code PL		Syllabus Area : PLAN	Foundation	Practitioner	Primary References
04	03	The specified initiative-level benefits management roles have been involved appropriately, with reasons: 1. Sponsor. 2. Programme/Project Manager. 3. Benefit Owner. 4. Benefit Manager.		✓	4.5, 7.9, Appendix C

Syllabus Area Code RZ		Syllabus Area : REALIZE	Foundation	Practitioner	Primary References
Level	Topic				
Know key facts, including terms, principles, practices, techniques, documentation, roles and responsibilities from the *Managing Benefits* Guide. **Specifically to recall:**					
01	01	The objective and scope of the Realize practice.	✓		8.1-8.2
Understand the terms, principles, practices, techniques, documentation, roles and responsibilities and can explain how these are applied in practice. **Specifically to identify:**					
02	01	What is involved in transition management.	✓		8.3, 8.3.1-2
02	02	What is involved in tracking and reporting benefits realization and taking corrective action.	✓		8.4, 8.4.1-4
02	03	What is involved in achieving behavioural change by winning hearts as well as minds: • Align incentives with benefits realization. • Recognize the power of conversations. • Adopt new routines. • Apply learnings from the fields of neuroscience and psychology. • Develop measures that engage. • Utilize ‘narrative leadership’ and storytelling.	✓		8.5, 8.5.1-6
Be able to apply *and tailor* the terms, principles, practices, techniques, documentation, roles and responsibilities of *Managing Benefits* to a scenario. **Specifically to:**					

Syllabus Area Code RZ		Syllabus Area : REALIZE	Foundation	Practitioner	Primary References
03	01	Identify appropriate applications of the Realize practice of the Benefits Management Cycle for a given scenario, including approaches and techniques designed to: 1. Manage transition. 2. Track and report on benefits realization. 3. Achieve behavioural change.		✓	8.3, 8.3.1-2 8.4, 8.4.1-4 8.5, 8.5.1-6
Be able to analyse and distinguish between appropriate and inappropriate application of the guidance through appraisal of the justification, planning, design, implementation and operation of benefits management to a scenario. **Specifically to analyze with reasons whether:**					
04	01	The approaches and techniques adopted are appropriate, with reasons, in a given scenario when: 1. Managing transition. 2. Tracking and reporting on benefits realization. 3. Designing strategies to achieve behavioural change.		✓	8.3, 8.3.1-2 8.4, 8.4.1-4 8.5, 8.5.1-6

Syllabus Area Code RW		Syllabus Area : REVIEW	Foundation	Practitioner	Primary References
Level	Topic				
Know key facts, including terms, principles, practices, techniques, documentation, roles and responsibilities from the *Managing Benefits* Guide. **Specifically to recall:**					
01	01	The objectives and scope of the Review practice.	✓		9.1-9.2
Understand the terms, principles, practices, techniques, documentation, roles and responsibilities and can explain how these are applied in practice. **Specifically to identify:**					
02	01	What is involved in reviews at start up specifically, start gate and pre-mortems.	✓		2.3.2, 9.3.1-2
02	02	What is involved in ‘in flight’ benefits reviews, stage/phase gate reviews, portfolio-level reviews and Gateway™ reviews.	✓		9.4, 9.6, 10.3.3, 10.3.3.1-10.3.3.2
02	03	What is involved in post-implementation and post-investment reviews.	✓		2.3.2, 9.5, 9.5.1-3, 10.3.6

Syllabus Area Code RW		Syllabus Area : **REVIEW**	Foundation	Practitioner	Primary References
Be able to apply *and tailor* the terms, principles, practices, techniques, documentation, roles and responsibilities of *Managing Benefits* to a scenario. **Specifically to:**					
03	01	Identify appropriate applications of the Review practice of the Benefits Management Cycle for a given scenario, including approaches and techniques designed to: 1. Review initiatives at start up. 2. Review initiatives ‘in flight’. 3. Review initiatives after implementation. 4. Undertake portfolio-level reviews.		✓	2.3.2, 9.3.1-2 9.4, 9.6, 10.3.3.1 2.3.2, 9.5, 9.5.1-3, 10.3.6 10.3.3.2
Be able to analyse and distinguish between appropriate and inappropriate application of the guidance through appraisal of the justification, planning, design, implementation and operation of benefits management to a scenario. **Specifically to analyze with reasons whether:**					
04	01	The approaches and techniques adopted are appropriate, with reasons, in a given scenario when: 1. Reviewing initiatives at start up. 2. Reviewing initiatives ‘in flight’. 3. Reviewing initiatives after implementation. 4. Undertaking portfolio-level reviews.		✓	2.3.2, 9.3.1-2 9.4, 9.6, 10.3.3.1 2.3.2, 9.5, 9.5.1-3, 10.3.6 10.3.3.2

Syllabus Area Code PF		Syllabus Area : **PORTFOLIO-BASED APPLICATION**	Foundation	Practitioner	Primary References
Level	Topic				
Know key facts, including terms, principles, practices, techniques, documentation, roles and responsibilities from the *Managing Benefits* Guide. **Specifically to recall:**					
01	01	The objectives and scope of portfolio-based benefits management including the names of the seven key elements in portfolio-based benefits management.	✓		3.6, 10.1-10.2, 10.3
Understand the terms, principles, practices, techniques, documentation, roles and responsibilities and can explain how these are applied in practice. **Specifically to identify:**					
02	01	What is involved with element 1: Benefits eligibility rules, including a consistent approach to benefits categorization and features of an appropriate benefits categorization system.	✓		10.3.1, 10.3.1.1
02	02	What is involved with element 2: Portfolio-level Benefits Realization Planning including consideration of portfolio-level benefits threats, dependencies and opportunities.	✓		10.3.2, 10.3.2.1
02	03	What is involved with element 4: Effective arrangements to manage benefits post initiative closure.	✓		10.3.4
02	04	What is involved with element 5: Tracking and reporting benefits realization at a portfolio level.	✓		10.3.5
02	05	The purpose and typical contents of the main portfolio-level documentation: 1. Benefits Management Framework. 2. Benefits Realization Plan. 3. Portfolio Dashboard Report.	✓		10.3.7.1, Appendix B
02	06	The responsibilities of the main portfolio management roles in relation to benefits management: 1. Portfolio Investment Committee. 2. Portfolio Delivery Committee. 3. Portfolio Director. 4. Portfolio Benefits Manager.	✓		10.3.7.2, Appendix C
Be able to apply *and tailor* the terms, principles, practices, techniques, documentation, roles and responsibilities of *Managing Benefits* to a scenario. **Specifically to:**					

Syllabus Area Code PF		Syllabus Area : **PORTFOLIO-BASED APPLICATION**	Foundation	Practitioner	Primary References
03	01	Identify appropriate applications of portfolio-based benefits management for a given scenario, including approaches and techniques designed to ensure: 1. A consistent approach to benefits identification, categorization, quantification and valuation. 2. Effective portfolio-level benefits realization planning including consideration of portfolio-level benefits threats, dependencies and opportunities. 3. Effective management of benefits post-initiative closure. 4. Effective tracking and reporting of benefits realization at a portfolio level.		✓	10.3.1, 10.3.1.1 10.3.2, 10.3.2.1 10.3.4 10.3.5
03	02	Identify appropriate information, using typical contents, for inclusion in the relevant portfolio-level benefits management documentation: 1. Portfolio Benefits Management Framework. 2. Portfolio Benefits Realization Plan. 3. Portfolio Dashboard Report.		✓	10.3.2, 10.3.7.1, Appendix B
03	03	Identify appropriate application of the main portfolio-level benefits management roles: 1. Portfolio Investment Committee. 2. Portfolio Delivery Committee. 3. Portfolio Director. 4. Portfolio Benefits Manager.		✓	10.3.7.2, Appendix C
Be able to analyse and distinguish between appropriate and inappropriate application of the guidance through appraisal of the justification, planning, design, implementation and operation of benefits management to a scenario. **Specifically to analyze with reasons whether:**					
04	01	The approaches and techniques adopted are appropriate, with reasons, in a given scenario to achieve: 1. Consistent approaches to benefits identification, categorization, quantification and valuation. 2. Effective portfolio-level benefits realization planning including consideration of portfolio-level benefits threats, dependencies and opportunities. 3. Effective management of benefits post-initiative closure. 4. Effective tracking and reporting of benefits realization at a portfolio level.		✓	10.3.1, 10.3.1.1 10.3.2, 10.3.2.1 10.3.4 10.3.5

Syllabus Area Code PF		Syllabus Area : PORTFOLIO-BASED APPLICATION	Foundation	Practitioner	Primary References
04	02	Portfolio-level benefits management documentation is fit for purpose, with reasons: 1. Portfolio Benefits Management Framework. 2. Portfolio Benefits Realization Plan. 3. Portfolio Dashboard Report.		✓	10.3.2, 10.3.7.1, Appendix B
04	03	The specified portfolio-level benefits management roles have been involved appropriately, with reasons: 1. Portfolio Investment Committee. 2. Portfolio Delivery Committee. 3. Portfolio Director. 4. Portfolio Benefits Manager.		✓	10.3.7.2, Appendix C

Note:
Elements 3 (re-appraisal of benefits at stage/phase gates and portfolio-level reviews) and 6 (regular and robust post-implementation reviews) of Portfolio-based benefits management are included in the Review syllabus area.

Syllabus Area Code IS		Syllabus Area : IMPLEMENT & SUSTAIN	Foundation	Practitioner	Primary References
Level	Topic				
Know key facts, including terms, principles, practices, techniques, documentation, roles and responsibilities from the *Managing Benefits* Guide. **Specifically to recall:**					
01	01	The three broad approaches to implementing benefits management.	✓		11.2
Understand the terms, principles, practices, techniques, documentation, roles and responsibilities and can explain how these are applied in practice. **Specifically to identify:**					
02	01	When each approach to implementation is most relevant, the advantages of planned approaches to implementation, and the first ten steps in implementing benefits management.	✓		11.2, 11.2.1
02	02	The factors to consider in sustaining progress, and specifically: 1. Effective governance and the role of the VMO. 2. Treating the development of benefits management as a benefits-led business and behavioural change programme. 3. On-going stakeholder engagement in the development of benefits management including application of the 'Champion-Challenger' model. 4. Measuring progress – performance impact and maturity assessments. 5. Appropriate use of software. 6. Staff training and development.	✓		11.3 11.3.1 11.3.2, Appendix F 11.3.3 11.3.4, 11.3.4.1-2, Appendix F 11.3.5 11.3.6, Appendix E
Be able to apply *and tailor* the terms, principles, practices, techniques, documentation, roles and responsibilities of *Managing Benefits* to a scenario. **Specifically to:**					
03	01	Identify appropriate approaches to implementing, sustaining, and measuring benefits management for a given scenario, including: 1. Selection of an appropriate approach to implementation. 2. Coordination of benefits management with key corporate functions/activities. 3. Designing a strategy to sustain progress. 4. Assessing progress encompassing process maturity and evidence of performance impact.		✓	11.2, 11.2.1 4.2 11.3.1-6 11.3.4.1-2, Appendix F & G
Be able to analyse and distinguish between appropriate and inappropriate application of the guidance through appraisal of the justification, planning, design, implementation and operation of benefits management to a scenario. **Specifically to analyse with reasons whether:**					
04	01	Recommended approaches to implementing, sustaining, and measuring benefits management have been undertaken appropriately in the context of a given scenario, with reasons.		✓	11.2, 11.2.1 11.3.1-6 Appendix F & G