

# Benefits & Value Mapping Workshop Facilitation Guide

## Step 2 of the IBRS CDT Framework: Iterative Benefits & Value Refinement

Companion resource to: TechnologyOne — Local Government Digital Transformation: A Practical Guide to Value Realisation | IBRS, April 2026

### Purpose of This Guide

This guide supports the facilitation of the 90-minute whiteboard sessions for benefits identification described in Step 2 of the IBRS Continuous Digital Transformation (CDT) Framework. These sessions are conducted with operational managers before each ERP deployment phase to identify, prioritise, and baseline the specific benefits to be targeted in the upcoming release.

The sessions are the mechanism by which broad aspirational benefits in the business case are translated into specific, measurable, actionable targets that drive both the ERP configuration and the change management program. They are not optional — they are the engine of the CDT Framework.

► **IBRS Tip:** The sessions must happen before deployment so that the change management program can be designed around the specific benefit targets prior to starting each major phase of an ERP deployment that is focused on a specific area of the organisation, or a ‘module’ of the ERP. Running them post-deployment is like planning the training program after the system is already live. It is too late to make it matter.

### Session Overview

Item	Detail
Duration	90 minutes per session
Participants	3-6 operational managers directly affected by the modules being deployed. Do not include IT staff as primary participants, though they may (and should) attend as observers only.
Facilitator	PMO lead, Business Improvement Manager, or Change Manager. Must be someone who understands the CDT Framework and the benefits register.
Pre-work	The facilitator prepares a process playbook section relevant to the modules being deployed in this phase (drawn from the LG ERP Benefits Realisation Playbook companion document).
Output	2-5 new benefits register entries with baseline, target, owner, and measurement approach confirmed by the operational managers.
Frequency	Before each major ERP release phase, and at each bi-annual CDT check-in.

### Facilitator Preparation (Before the Session)

- Review the ERP vendor's release notes for the modules being deployed to understand the new capabilities being introduced.
- Select the relevant section(s) of the LG ERP Benefits Realisation Playbook that correspond to the modules in scope.
- Review the current benefits register. Know which benefits are Green, Amber, or Red and why.



- Prepare the opening question: 'What processes in your area are currently taking the most effort, and do you expect this release to change that?'
- Book the room. Whiteboard or large Post-it notes are essential. This is a workshop, not a meeting.
- Send participants a one-paragraph briefing note 48 hours before. Do not send a detailed "feature-by-feature" agenda. You want their unprimed, but thoughtful, perspectives.

## Session Structure

### 0-10 min: Introduction and Context Setting

Welcome participants. Explain the purpose in plain language: 'We are here to decide what changes we want to see from the upcoming ERP (module) release, and how we will know when we have achieved them. This is not a review of the technology. It is a conversation about how your work will change and what success looks like.'

Reference the benefits register briefly. Show where the council is on the maturity model. Frame this session as advancing maturity, not just completing a project task.

### 10-40 min: Process Exploration (Playbook-Guided)

Work through the relevant playbook section. For each process area, ask the opening question and let the conversation develop. The three types of response you will encounter:

- 'Yeah, that's working fine.' — Move on quickly. These are stable processes. Note them in the register as 'No priority — baseline adequate.'
- Confusion or disagreement about how the process currently works — This is important. Disagreement about the current state means the process is not well-defined. Flag it as a process design issue, not just a benefits opportunity.
- Clear agreement that the process is painful or inefficient *and* can be addressed with the ERP module(s) being discussed — These are your targets. Slow down and explore fully.

For each identified pain point, probe with the following questions (select 2-3, not all of them):

- 'What specifically causes the pain — is it the volume, the complexity, the number of handoffs, the rework?'
- 'If this process worked perfectly, what would be different about your week?'
- 'How much of your team's time goes into this process each week? Can you give me an estimate?'
- 'What would a 30% improvement in this area be worth to you in practical terms?'
- 'Who else in the organisation is affected by this process? Are they in the room?'

### 40-60 min: Benefit Prioritisation

Once 5-10 potential benefit areas have been identified, work with the group to prioritise. The benefits register can eventually accommodate all of them, but the change management program can only focus on 2-4 per phase. Ask the group to rank by: (1) potential impact, (2) readiness to change, and (3) measurability.

For the top 2-4 benefits, establish:

- What is the current baseline? (estimate is sufficient at this stage)
- What is a realistic target? (avoid aspirational numbers — what would represent genuine success?)
- Who will own this benefit? (must be an operational manager in the room, not IT)
- How will we measure it? (what data source, what frequency, who collects it?)
- By when? (set a specific date tied to the ERP deployment schedule)



### 60-75 min: Disbenefits Probe

This step is critical and frequently skipped. Before closing, explicitly ask about the downsides of the proposed changes.

- 'If we standardise this process to match the ERP's standard workflow — which team or department loses something?'
- 'Are there any groups of staff or ratepayers who will find this change harder?'
- 'What could go wrong with this change that we are not talking about?'

Document the disbenefits alongside the benefits in the register. They feed directly into the change management plan — staff who will experience friction from standardisation need targeted support, not just generic training.

### 75-90 min: Confirm Outputs and Close

Read back the 2-4 benefit entries you have captured. Confirm baseline, target, owner, measurement approach, and timing with the group. Ask each benefit owner to confirm they accept accountability. Explain that these entries will be added to the benefits register and reviewed at the next quarterly CDT check-in.

Close with: 'The change management program for this release will be designed around achieving the targets you have committed to today — not around the software release schedule. You own these outcomes.'

► **IBRS Tip:** When benefit owners hear 'the change program is designed around YOUR targets,' the dynamic shifts. They move from passive recipients of training to active partners in the change. That shift in ownership is worth more than any specific metric captured in the session. However, it is vital that the ownership is then genuinely acted upon and supported.

## Handling Common Facilitation Challenges

Challenge	Suggested Response
Participants claim everything is fine / nothing needs to change	Probe gently: 'What does a bad day look like for your team right now? What is the process that makes people sigh?' Almost every operational team has at least one pain point. If none is genuinely found, that domain may already be at Level 4-5 maturity.
Aspirational targets that are not credible	Ask: 'What would you need to change in your team's processes, not just the technology, to achieve that target?' If the answer reveals a significant operational change, the target may be right. If it reveals nothing, the target is aspirational. Agree on a more conservative 12-month target and an aspirational 3-year target.
No agreement on who owns a benefit	This is a governance issue, not a workshop issue. Note it as an action: 'Benefit owner to be confirmed by [date] by program sponsor.' Do not allow the benefit to proceed without an owner.
IT staff dominating the conversation	Redirect: 'I appreciate the technical context, but I want to hear from the business about what success looks like in your day-to-day work.' Operational managers need to own the answer, even if IT may have begun the conversation.
Disbenefits are dismissed as 'not our problem'	Record them anyway. Disbenefits that are dismissed in workshops have a way of becoming significant problems six months after go-live. Flag them for the change management plan even if the group is not concerned.

## Post-Session Actions

- Update the benefits register with confirmed entries within 24 hours of the session.



- Send a summary to all participants confirming the benefits they have committed to own.
- Share the confirmed benefit targets with the change management team — the change program for this phase is now designed around these targets.
- Add the confirmed benefits to the steering committee reporting pack.
- Calendar the measurement check-in date for each benefit.

