

Benefits Register: User Guide

Local Government ERP Programs

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

Purpose

The Benefits Register is the operational heartbeat of the *Continuous Digital Transformation (CDT) Framework*. It is not a report too. It is a direction-setting instrument. It records what the council intends to achieve, tracks progress against those intentions, and most importantly, signals where additional change effort is needed to bring the program back on track.

A governed spreadsheet is sufficient for most councils. The CDT Framework deliberately forgoes sophisticated benefits tracking solutions in favour of a simple register that is actually used. Tracking exact benefit achievement with academic precision is far less important than using the benefit targets to drive organisational change.

How the Register Works

- The Register tab captures each benefit with its domain, owner, baseline, target, current measurement, and RAG status.
- The Dashboard tab provides an executive summary view suitable for steering committee papers.
- Benefits are added iteratively, before each ERP release phase, not all at once at project inception.
- The register is reviewed at each quarterly CDT check-in and updated by the benefit owner.
- Red-status benefits trigger a conversation about what additional change effort is required, not a blame exercise.

► **IBRS Tip:** The benefits register is only valuable if it is reviewed regularly and acted upon. An unreviewed register is worse than no register. It creates the illusion of governance without the substance. Schedule the quarterly review in the governance calendar at the start of each financial year and treat it as a standing commitment, not an optional meeting.

Populating the Register

Step 1: Identify Benefits: Conduct a 90-minute whiteboard session with the operational managers affected by each ERP module before deployment. Ask: What processes are taking the most effort? What would you like to change? What impact would that change have? Record the outputs as candidate benefits.

Step 2: Classify by Domain: Assign each benefit to one of the six value domains (Financial, Operational, Customer & Community, Technology, Risk & Compliance, Capability). This ensures the register is balanced and that reporting to the board covers all dimensions of value.

Step 3: Establish Baselines: For each benefit, record the current state before the ERP change, including process times, FTE effort, costs, and satisfaction scores. If precise data is unavailable, use estimates from operational managers. Good enough is good enough at this stage.

Step 4: Set Targets: Define what 'good' looks like for each benefit, including what specific, measurable change you expect to achieve, and by when. Targets must be tied to the council's operational reality, not aspirational projections from the business case.



Step 5: Assign Owners: Designate a benefit owner for each entry. Ensure this is an operational business manager, not IT. The benefit owner is accountable for achieving the target and for reporting progress at the quarterly review. IT provides the platform; the business owns the outcome.

Step 6: Measure and Update: At each quarterly review, the benefit owner updates the current measurement column and assigns a Red Amber Green (RAG) status. Red benefits (falling significantly short of the target) trigger a discussion about what change effort is missing or needs to be redesigned.

RAG Status Definitions

Status	Definition	Required Action
Green	On track or exceeding target	Continue current approach. Document what is working for future reference.
Amber	Tracking below target but recoverable	Identify the specific gap. Agree a recovery action with the benefit owner. Review at next quarter.
Red	Significantly off target or stalled	Escalate to the program sponsor. Review whether the change management program needs redesign. Do not accept 'the system is not ready' as an explanation.
Not Yet Measured	The measurement period has not commenced	Confirm the measurement start date. Ensure baseline data is in place before the ERP change is deployed.

Governance Commitments

- The register is formally approved by the executive before the first ERP release.
- The register is a standing agenda item at every steering committee meeting.
- Every incoming executive (CIO, CFO, CEO, program sponsor) receives a formal register onboarding briefing.
- The register survives the project — it transitions to the Business Improvement function when the ERP program closes.

► **IBRS Tip:** When a new executive joins mid-program, do not wait for them to ask about benefits. Schedule a structured onboarding session within their first two weeks. Walk them through every green, amber, and red benefit, and the rationale behind each target, the evidence behind each measurement, and the change management actions in place for each red. This single session prevents months of executive anxiety and protects the program from direction resets driven by incomplete information.

