

Benefits Management using AI webinar Question and Answers

Detailed answers to questions received during the live webinar, 15 April 2026

Compiled by Hannah McBain

Question	Reply from Hannah McBain
<p>If Value Management is used to define the Stakeholders' 'Need' through Function Analysis and drive 'value' then how does Benefits Management relate to this?</p>	<p>They're closely related but sometimes focus on different parts of the lifecycle.</p> <p>Value Management is very strong at defining what matters and shaping the solution early on. Benefits Management takes that forward into delivery and beyond, making sure those intended outcomes are actually realised, measured, and sustained.</p> <p>In practice, the line between them isn't always fixed. Results-focused organisations tend to keep managing value over time, especially where services are being delivered and evolved. In that sense, value thinking doesn't stop at the start, it becomes something you actively manage. And as with Benefits Management, you can use it to evidence the value a service or product actually delivers.</p> <p>The processes of defining, evidencing, tracking and reporting are very similar in both cases, so the same structured approaches can support both.</p> <p>AI can support both too, but with exactly the same challenges. It only works if that connection between intent and measurement is clear.</p>
<p>Have you any real practical tips for encouraging senior leaders (sponsors and stakeholders) to adopt and adapt to allow more time for benefits, especially when there is no (or very little) appetite for any other than delivering. Where there's no appetite for tracking or measuring benefits (or to include that in projects from the start) and despite the provision of a benefits management frameworks?</p>	<p>This is very common.</p> <p>The most practical approach is to link benefits directly to the decisions leaders already care about — funding, prioritisation, and return on investment.</p> <p>If benefits are seen as extra work, they get ignored. If they are clearly tied to decisions like “should we continue, change, or stop this?”, they become relevant very quickly.</p> <p>AI can help reduce effort, but it doesn't solve the engagement problem. That comes down to making benefits part of how decisions are made, not something separate. In practice, that usually means embedding them into stage gates and governance conversations that already exist.</p>

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<p>The key is identifying and defining the right benefits and identifying and getting commitment from Benefit Realisation Idea Owners to deliver to agreed timescales. Have you any examples of how difficult this is?</p>	<p>Yes this is very hard in practice.</p> <p>You often see vague or overlapping benefits, no clear baseline, and ownership that is technically assigned but not really understood or accepted.</p> <p>The real challenge is not defining more benefits but defining a small number that people actually believe in and act on.</p> <p>AI can help you get started, but it doesn't create ownership. That still comes from conversations, clarity, and making expectations tangible. The risk otherwise is either creating too much work for benefit owners, or something so abstract they don't know what to do with it.</p>
<p>Has anyone used a different product such as the free version of Microsoft CoPilot to work up a benefit profile, benefits realisation plan, and basic map or anything similar?</p>	<p>I've tried Copilot and ChatGPT (Instant) in a fairly unscientific way, using minimal prompts to generate a benefits map.</p> <p>The outputs are quite different. Copilot tends to produce something more visual and grouped, which is useful for quickly communicating an idea. ChatGPT tends to be more structured, closer to a traditional benefits mapping flow.</p> <p>So individually, both can produce something that looks like a reasonable map quite quickly. But the challenge isn't generating an output, it's what that output represents. The results vary depending on the version and how it's been trained, and prompts don't persist reliably. So, you still have to define what you want and refine and reuse prompts to get something consistent.</p> <p>If you already know what good looks like, these tools can help you get there faster. If you don't, you're still relying on your own judgement to shape and assess the output.</p> <p>And the bigger issue comes at an organisational level. Across multiple projects, without shared structure and definitions and design, you quickly end up with different interpretations, inconsistent measures, and difficulty comparing or aggregating value.</p>

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	<p>So, AI is a useful starting point, but it doesn't solve consistency at scale. It still needs a clear framework and shared approach around it. Although ChatGPT seems to align more closely with BRM-style thinking, both depend heavily on configuration and training. We're still at a stage where we all need to be experimenting with what works best for our needs.</p> <p style="text-align: center;">Website Upgrade – Benefits Map</p> <p>Copilot</p> <p>ChatGPT Instant</p> <p style="text-align: center;">Benefits Map: Website Upgrade with E-commerce</p>

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<p>Can the system notice how one project might have similar benefits to benefits that another project has? And can it monitor benefits that a programme has, so the projects feed into the programme's benefits?</p>	<p>In Wovex, we do two things to tackle these issues firstly benefits and measures can be tracked in relation to each project in a way that avoids double counting and encourages the consistent use of fewer, shared measures.</p> <p>Secondly AI helps data quality by highlighting duplicate or similar benefits and measures. Wovex can also monitor delivery over time for each measure against each project, and those measures can be set to sum or calculate up into higher-level measures for programme or organisational reporting.</p> <p>That is not something a generic AI tool is likely to do well or consistently on its own. A general-purpose tool may help draft or identify similarities, but it won't usually provide the structured relationships, roll-up logic, and controls needed to manage this reliably at scale.</p> <p>More generally, in any system or approach, once benefits and measures are captured in one place and defined consistently, it becomes possible to identify:</p> <ul style="list-style-type: none"> • similar or duplicated benefits across projects • overlapping measures • opportunities to standardise definitions <p>That supports programme-level views, where project contributions can be linked to wider outcomes.</p> <p>AI can help by highlighting similarities and patterns, but it still doesn't decide whether things should be merged or treated separately. That still requires human judgement.</p>
<p>What do you mean by 'agent-based processes' in your context?</p>	<p>In this context, agentic AI is about AI moving beyond suggesting ideas to supporting actions and workflow.</p> <p>So instead of just recommending something, it might draft it, link it, suggest next steps, and prompt you to apply those changes.</p>

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	<p>Wovex is carefully introducing AI features to ensure the design helps good practice and ease of use and limits the introduction of unintended consequences.</p> <p>But the important point is that people still review and approve AI outputs. It's there to support the process, not take control of it.</p>
<p>I'm conscious of AI potentially taking away the human element/creativity - are you seeing this in practice or is it actually having the opposite effect where teams are becoming more creative in having something in front of them as a starting point?</p>	<p>There is definitely a risk of this if we rely on AI too much and don't trust our understanding of the organisational context.</p> <p>But at this stage in many cases, it tends to do the opposite. It removes the fear of idea generation in any area where we are not experienced.</p> <p>Starting from a blank page is often a barrier. Having something in front of you, even if it isn't quite right, can make it easier to react, refine, and improve.</p> <p>The risk isn't so much loss of creativity but accepting outputs too quickly without challenge.</p> <p>Used well, AI gives people more to work with. The human role is still to question, adapt, and agree what is actually right.</p>
<p>How do you find AI helping with the outcome and economic evaluations. I foresee advantages in the speedier review of mass data, investigation throughout pages of business case materials. Are there other positives?</p>	<p>Yes, I agree with that — the ability to review and summarise large volumes of information quickly is one of the biggest advantages.</p> <p>It's particularly useful for:</p> <ul style="list-style-type: none"> • pulling out relevant assumptions or measures from long business case documents • spotting inconsistencies or gaps across different sources • helping structure thinking where there are a lot of moving parts <p>Another positive is consistency. AI can help apply the same logic or structure across multiple evaluations, which can make comparisons easier.</p>

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	<p>But it's still important to stress that it doesn't replace the judgement behind economic evaluation. It can help you get to the right questions faster, but the assumptions and conclusions still need to be understood and challenged.</p>
<p>Has the use for AI lead to more automisation within other processes within Wovex, such as using data bricks and coding to automate outputs for data sets</p>	<p>Yes, it has led to more automation, but not in the sense of fully automated outputs without oversight.</p> <p>In Wovex, it's more about supporting and streamlining processes, for example:</p> <ul style="list-style-type: none"> • generating draft content or structures • helping organise and summarise data • highlighting gaps or inconsistencies <p>There are also more traditional forms of automation behind the scenes in terms of how data is processed and presented, but AI is mainly being used to reduce manual effort and support users in working with the data, rather than replacing the need for review and control.</p>
<p>How does AI improve risk management in projects. What are communication bottlenecks & how can AI help?</p>	<p>This is similar to Benefits Management. AI can help by:</p> <ul style="list-style-type: none"> • highlighting inconsistencies or missing data • surfacing risks earlier • summarising status clearly <p>For communication:</p> <ul style="list-style-type: none"> • turning complex data into simpler narratives • helping people prepare for governance conversations <p>But again, it supports communication — it doesn't replace it.</p>

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<p>Do you feel getting AI to provide a starter for 10, can be a double edged sword? In that we rely on it to provide the boundary lines of the discussion points</p>	<p>Yes, definitely.</p> <p>It helps overcome the blank page, but it can also anchor thinking too early. The key is to treat AI outputs as something to react to, not something to use verbatim and to ensure you don't forget to talk about the people who really understand the world that measures will be tracked in. If the measures and benefits aren't practical they won't get traction.</p>
<p>How does Benefits Management related to Earned Value Management used in a PMO and if BM is integrated should the PMO be a VMO?</p>	<p>They relate, but they are not the same thing.</p> <p>Earned Value Management is a performance control method. It tells you whether delivery is progressing against scope, schedule, and cost using a defined calculation model.</p> <p>Benefits Management is about whether that delivery is creating the outcomes and value it was meant to create.</p> <p>So EVM can tell you a project is being delivered efficiently. Benefits Management tells you whether it was worth delivering in the first place, and whether the value is actually materialising.</p> <p>They work well together:</p> <p>EVM helps answer, "Are we delivering as planned?" Benefits Management helps answer, "Is this delivering the value we promised?"</p> <p>On whether a PMO should become a VMO, I'd say not necessarily by name, but certainly in mindset. If a PMO is serious about outcomes, then value and benefits should be part of its operating model, not treated as an optional extra.</p>
<p>how have you managed the data security side of using AI</p>	<p>Carefully, and with a lot of caution.</p> <p>We have some very high security customers with different policies. So, we allow customers to not use AI at all and the AI tools we use do not learn and feed information back to the Large Learning model.</p>

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	<p>But when using separate AI tools individually it depends what setting every user uses, of course.</p> <p>The main point is that AI should sit inside the same security expectations as any other enterprise system.</p> <p>More broadly, this is one reason I keep coming back to structure and governance. If your information is messy, uncontrolled, or widely scattered, AI increases the risk. If it sits in a controlled process with clear permissions and purpose, AI becomes much safer to use.</p>
<p>Benefits management frameworks tend to focus on value realisation, but projects also generate disbenefits like increased workload during transition, redundancies, process disruption, or unintended consequences for stakeholders who lose out. How does it handle the identification, tracking and mitigation of disbenefits alongside benefits?</p>	<p>It should handle them in exactly the same disciplined way.</p> <p>Disbenefits are part of the value picture, not an optional add-on. If a project creates pain, cost, disruption, or negative stakeholder impact, that needs to be identified, owned, measured, and reviewed alongside the benefits.</p> <p>They need to be defined, owned, tracked, and reviewed. The difficulty is often getting people to be as explicit about disbenefits as they are about benefits.</p> <p>AI can help surface likely disbenefits, especially from documents or past patterns, but it should not decide what matters. That still needs judgement.</p> <p>In practice, one of the risks is that teams are often more willing to generate benefits than to name disbenefits honestly. So the discipline matters even more there.</p>
<p>With the advent typewriters and word processors people forgot how to write (neatly) ... Do you think with AI people will forget how to think (lucidly)?</p> <p>And if we do artistic writing, calligraphy journal writing to make up for bad hand writing - will we need to take up puzzles,</p>	<p>Yes. Only if we use it lazily.</p> <p>I do think there is a real risk that people stop doing some of the hard thinking if they start treating AI output as finished thought rather than draft material.</p> <p>But I also think the opposite can happen. If used well, AI can give people something to react to, challenge, refine, and improve. That can actually sharpen thinking rather than reduce it. But as AI gets more accurate with fewer hallucinations the risk will grow that we trust it too much and defer to it in everything.</p>

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critical thinking games and philosophy to make up for lack of thinking in the workplace?	<p>So I don't think AI inevitably makes people think less clearly. I think passive use makes people think less clearly. Active use can still support strong judgement.</p> <p>That is why I keep saying AI should be challenged, not just accepted.</p>