OMNITEK CONSULTING

Benefits Realization Tracking

WHITE PAPER

Proving the ROI of Standardization Investments to Leadership

Abstract

Most PMOs can report that a standardization initiative finished on time and on budget. Far fewer can tell an executive committee what that initiative actually bought the organization eighteen months later. PMI's research puts a number on the gap: 83% of organizations still lack maturity in benefits realization management, the discipline of tracking whether a program's promised value ever shows up. The same research found that benefits management practices explain barely 16% of how success gets perceived overall, yet drive 37 to 49% of perceptions around ROI, business case adherence, and delivered outcomes, meaning the metric most PMOs report on is not the one leadership actually uses to judge them. In life sciences, where a single day of clinical trial delay now averages roughly $500,000 in lost value, an unmeasured standardization program is not a minor gap. It is a program leadership cannot defend at budget season. This white paper applies established program and portfolio management best practices to a practical benefits realization framework, built to connect a PMO's process investments to the business outcomes they were funded to produce.

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The Metric Leadership Actually Cares About

A PMO leader walks into a budget review with a deck full of green status indicators. On time. On budget. Milestones hit. The executive across the table asks a different question: what did we get for it? That question exposes a gap that most PMOs are not built to close, because tracking whether a project delivered its outputs and tracking whether those outputs produced the value the business case promised are two different disciplines, and most organizations have built muscle for only the first one.

PMI's research on benefits realization management makes the scale of the gap concrete. Across 331 responses from practitioners in the US, UK, and Brazil, benefits management practices explained only 16% of overall project success as people perceived it, a modest share that reflects how much success perception still rides on schedule and output delivery.[i] But when the researchers isolated the perceptions that matter most to executives, specifically return on investment, business case adherence, and whether expected outcomes actually materialized, those same benefits practices explained 37% to 49% of the variance.[i] The PMO reporting on schedule and budget is answering a question the project team asked itself. The executive is asking a different question, and the PMO that cannot answer it is invisible at exactly the moment its budget gets decided.

This is not a niche gap. PMI's broader Pulse of the Profession data puts the number at 83% of organizations lacking maturity in benefits realization management, a figure consistent enough across years of surveying that it functions less like a snapshot and more like a description of the industry's default state.[ii] Standardization initiatives, harmonized templates, unified governance models, consolidated reporting, are especially exposed to this gap because their value is diffuse and shows up gradually across many programs rather than in one visible deliverable. A PMO can roll out a standardized protocol review process flawlessly and still have no defensible answer, a year later, to whether it actually reduced amendments.

Why Outputs Get Tracked and Outcomes Do Not

The reason is structural, not a matter of PMOs not caring about outcomes. A project closes. The team disbands, moves to the next program, and the governance attention that tracked the initiative closely during execution moves with them. Outputs are easy to verify at the moment of closure: the template exists, the training happened, the new process is documented. Outcomes only show up afterward, in metrics nobody is watching anymore because the initiative that was supposed to move them has already been marked complete.

Life sciences programs make this timing problem worse. The value of a standardized protocol review process shows up in amendment rates measured across the next several trials, not the trial that was running when the process launched. The value of a consolidated resource planning model shows up in utilization data collected over the following fiscal year. By the time enough evidence accumulates to say whether the initiative worked, the PMO has moved on to three other priorities and nobody owns the follow-up.

The cost of that gap is not abstract in a clinical development context. Tufts Center for the Study of Drug Development research, cited in a 2024 industry analysis of trial delay costs, puts the average value lost per day of clinical trial delay at roughly $500,000, down from earlier estimates but still a figure that makes any process improvement claiming to reduce delay worth tracking rigorously.[iii] A PMO that cannot show whether its standardization work actually shortened cycle times is leaving its strongest argument for continued investment unmade, not because the argument is false, but because nobody built the system to prove it.

Applying Best Practices: A Benefits Realization Layer

A foundational best practice in PMO maturity treats Strategic Alignment and Value Measurement as one of five maturity dimensions, and benefits realization tracking is the operational discipline that dimension depends on. Applying that discipline to a working benefits realization layer means building four structural habits into how standardization initiatives get chartered and closed.

1. **A Benefits Baseline Set Before the Initiative Starts.** Every standardization initiative defines, in the business case, the specific metric it expects to move and the current baseline for that metric, not just the deliverable it will produce.
2. **A Named Owner Who Survives Project Closure.** Someone outside the delivery team, typically a portfolio or PMO lead, owns tracking the benefit after the project team disbands, so measurement does not depend on people who have already moved to the next assignment.
3. **Scheduled Benefit Checkpoints, Not Just a Launch Date.** Realization gets checked at fixed intervals, commonly ninety days, six months, and twelve months post launch, rather than left to an informal retrospective that may or may not happen.
4. **A Standard Realization Report Format Across Initiatives.** Every tracked benefit rolls up into the same simple structure, baseline, target, current actual, and variance, so a portfolio review can compare a governance initiative against a technology initiative on equal footing.

None of this requires new software or a heavy governance layer. It requires deciding, at the point a standardization initiative is approved, that closing the project and closing the benefits case are two separate events, and that only the second one earns the PMO credit for the work.

What Benefits Tracking Buys, and Where It Gets Hard

Advantages

- **A defensible case at budget season:** a PMO that can show realized value on last year's initiatives has a materially stronger position asking for next year's budget than one that can only show completed deliverables.
- **Earlier detection of initiatives that are not working:** checking realization at ninety days surfaces a standardization effort that is not moving its target metric while there is still time to adjust it, rather than discovering the failure two years later.
- **Better prioritization across the portfolio:** a consistent realization report format lets leadership compare initiatives against each other on actual delivered value rather than perceived effort or visibility.
- **A cultural shift toward outcomes:** teams that know their work will be measured against a business outcome design differently than teams whose only accountability is a delivery date.

Risks and Barriers

- **Attribution difficulty:** a metric like amendment rate moves for many reasons, and isolating the effect of one standardization initiative from everything else changing at the same time requires honest analysis, not a convenient story.
- **Ownership drift:** if the named benefits owner changes roles or leaves, tracking quietly stops unless the handoff is treated as seriously as any other knowledge transfer.
- **Reporting fatigue:** adding a benefits checkpoint on top of existing status reporting needs to replace older, less useful reporting rather than simply adding to it, or it becomes another box to check.
- **Uncomfortable results:** some tracked initiatives will not hit their target, and a benefits realization practice only works if that result gets reported honestly rather than quietly dropped from the portfolio review.

Case in Point: The Initiative Nobody Could Defend

A mid-size pharmaceutical company's PMO rolled out a standardized protocol review checklist across its clinical development portfolio, aiming to reduce the substantial protocol amendments that had been driving cost and delay across recent trials. The rollout itself went well. Training completed on schedule, adoption across program teams was strong, and the initiative closed with a green status report and a case study slide for the next portfolio review.

Eighteen months later, a new VP of Clinical Operations asked a simple question: did the checklist actually reduce amendments? Nobody could answer with data. No baseline amendment rate had been captured before the rollout, no owner had been assigned to track the metric afterward, and the program teams that ran the initiative had moved to other assignments. The PMO believed the checklist had helped, based on informal feedback, but had no evidence to defend the claim when the VP proposed reallocating the budget toward a different priority. Retroactively reconstructing a baseline from historical trial data took the PMO nearly two months, and by the time the analysis was ready, the budget decision had already been made without it.

Recommendations for PMO and Portfolio Leaders

1. **Require a benefits baseline in every standardization business case.** No initiative gets chartered without a specific metric and a documented current value for it.
2. **Assign a benefits owner distinct from the delivery team.** Make that ownership explicit and survive the project's closure, not implicit and forgotten.
3. **Build realization checkpoints into the portfolio calendar.** Ninety days, six months, and twelve months post launch, reviewed at the same portfolio governance forum that approved the initiative.
4. **Standardize the realization report format across every initiative.** Baseline, target, current actual, variance, so initiatives can be compared on equal footing.
5. **Report negative results as openly as positive ones.** An initiative that did not move its target metric is valuable information for the next budget cycle, not a failure to hide.

6. **Feed realization data back into future business cases.** Use what actually happened on past initiatives to set more credible targets on the next round of proposals.

Measuring Success: KPIs for Benefits Realization

- **Benefits tracking coverage:** the percentage of standardization initiatives with a documented baseline, owner, and checkpoint schedule at charter.
- **Realization rate:** the percentage of tracked initiatives that met or exceeded their target metric at the twelve-month checkpoint.
- **Time to first checkpoint:** the average time between project closure and the first scheduled benefits review, tracked toward the ninety-day target.
- **Portfolio-level ROI narrative:** the share of the PMO's annual budget request supported by realized value data from prior-year initiatives rather than projected value alone.

Conclusion

A completed project and a delivered benefit are not the same claim, and the difference matters most in the room where a PMO's next budget gets decided. Most organizations still measure the first and assume the second, which is exactly why 83% of them report low maturity in the discipline that would let them prove it. Applying disciplined best practices to a genuine benefits realization practice does not require new tools or a heavier governance layer. It requires deciding, at the moment an initiative is chartered, that the project is not finished until its promised value has been checked against reality.

PMOs that build this discipline stop showing up to budget conversations with a deck of green status reports and start showing up with evidence. That distinction is what separates a function that survives the next round of cost cutting from one that gets asked to defend its existence every single year.

About OmniTek & Contact Information

OmniTek Consulting is a trusted partner for organizations seeking to enhance governance, operational agility, and decision-making. We specialize in modernizing business processes with a blend of human-centered design, technology expertise, and hands-on change management.

For PMO and portfolio leaders who need to defend standardization investments with evidence instead of anecdote, OmniTek applies proven best practices to build a practical benefits realization practice: baselines set before launch, ownership that survives project closure, and a consistent way to report what actually happened. Whether you are building this discipline from scratch or trying to reconstruct a defense for last year's initiatives, OmniTek can help you connect the work your PMO does to the outcomes leadership is actually judging it on.

Contact us today to explore how OmniTek can support your transformation journey and drive lasting results.

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Click here to book a 15-minute call to see how OmniTek can help your team put these insights into practice.

Endnotes

[i] Patah, L. A. et al., "Benefits Realization Management and Strategic Project Success Analysis of UK, USA, and Brazil," Project Management Institute, 2023, available at https://www.pmi.org/learning/library/benefits-realization-management-project-success-9653

[ii] Project Management Institute, "Delivering Value: Benefits Focus in Project Execution," Pulse of the Profession research, available at https://www.pmi.org/learning/thought-leadership/pulse/focus-on-benefits-during-project-execution

[iii] Cyntegrity, "The Real Cost of Delays in Drug Development and the Role of RBQM and QbD," citing Tufts Center for the Study of Drug Development research, 2024, available at https://cyntegrity.com/the-real-cost-of-delays-in-drug-development-and-the-role-of-rbqm-and-qbd/