Benefits management : lost or found in translation

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Benefits Management : Lost or found in translation

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Abstract

It is now about 25 years since the emergence of Benefits Management (BM), but hitherto it has had limited impact on project management and even less on general management practices. This is despite evidence that a focus on benefits improves the success rate of projects and programmes. One of the areas for research to explain the limited uptake concerns the spread of knowledge on BM and its adoption by organisations. The theoretical lens of translation is used to examine this issue, which focuses on the processes through which management ideas spread and influence management practice. The global development of BM is traced to identify the changes in translation processes over time and the current geographical patterns of usage. This analysis is used in conjunction with the limited evidence available on translation processes at the level of the organisation to identify key factors for the impact of BM in the future.

Key words: Benefits management; benefits realisation; value management; managing programmes and portfolios; knowledge management

1. Introduction

The term ‘benefits management’ was first used in the late 1980’s (Farbey et al., 1999), when concerns were raised that major investments in business change shaped and enabled by ICT were not achieving the expected benefits (Bradley, 2006; Marchand, 2004; Thorp, 1998; Ward and Daniel, 2006). The interest in benefits and the linked concept of ‘value’ has been associated with the introduction of programme and portfolio management levels (OGC, 2007; OGC, 2011), as part of what Morris (2011) has called ‘enterprise-wide’ project management. Benefits management[1] (BM) has therefore been an important part of the development of project management in the late twentieth and early twenty-first century, as efforts have been made to link individual projects, together with the management of change, more closely to organisational strategies and the focus has moved from product creation to value creation (Winter et al., 2006).

There is a growing body of evidence that the use of BM practices enhances the likelihood of projects achieving organisational goals, both in relation to IT investments (Ashurst, 2012; Ward and Daniel, 2012, Ward et al., 2007) and more generally (Serra and Kunc, 2015). Despite this, the uptake of BM practices has been low, with few organisations taking a comprehensive, full life-cycle approach to BM. A greater focus on BM could therefore help to address the persistently high failure rate of projects, particularly those involving IT-enabled change (Standish, 2013, Ward and Daniel, 2012).

[1] There are minor variations on the term ‘benefits management’ in both business practice and the academic literature, such as ‘benefit management’ (Zwikael, 2014) or ‘benefit(s) realisation management’ (Bradley, 2006). These alternative terms are treated here as being synonymous with ‘benefits management’.

There are a number of factors which might explain the low take up of BM. There are problems over the concepts of 'benefits' and 'value' which are partly due to the multiple meanings of the terms themselves (Winter et al., 2006) and the lack of consistency in the definitions developed by different professional groups, such as economists, accountants and project managers, which means that there is a lack of agreement on how to classify and measure benefits (Jenner, 2009). Furthermore, focusing attention on the creation of value and the realisation of benefits has implications for the organisation as a whole, affecting strategies at corporate, business and operational levels (Johnson et al., 2014) and diverse management domains, such as asset management and performance management. This means it challenges the wider mindset in an organisation (Jenner, 2009; Thorp, 1998) and hence may struggle to gain acceptance.

The literature on BM is poorly developed compared to many other aspects of project management. Thus, in the analysis of the evolution of project management research by Turner, Pinto and Bredillet (2011), BM does not figure as a research category. The literature which does exist tends to be either 'how to do it' guides (Bradley, 2006/2010; Payne, 2007, Thorp, 1998/2003) or analysis of BM processes and practices (APM, 2010; APM, 2012; Ashurst, 2012, Breese, 2012; Coombs, 2015; Lin and Pervan, 2003; K. Lin et al., 2005; Serra and Kunc, 2015; Ward et al., 2007). Where the processes involved in the adoption of BM are mentioned they may be identified as being subject to further analysis of the data (Ward et al., 2007) or as a topic for further research (Serra and Kunc, 2015). A few studies, mainly of IT enabled change in Scandinavia, have investigated the transfer of BM ideas and practices, either between organisations or within organisations (Hellang et al., 2013; Nielsen, 2013; Paivarinta et al., 2007), starting to build up an evidence base on the adoption of BM at the micro-scale. At the macro-scale, there has been little analysis of the current patterns of usage of BM on a global basis or exploration of the historical development of BM which has led to those patterns. This article addresses the neglect in the literature on the macro-scale level (Sections 3 and 4), and then reviews the emerging literature at the micro-scale (Section 5). This leads on to a discussion of the implications for the future of BM as a management idea, in terms of its impact on management practices (Section 6). In focussing attention on the uptake of BM, this article will be of use to academics seeking to explain current patterns of adoption, and also practitioners, trainers, policy makers and professional bodies who are seeking to promote the use of BM.

2. Theoretical Background

This article uses the theoretical lens of translation to examine the spread of knowledge on BM and its adoption and usage. Translation is an alternative to the traditional approach to analysis of the transfer of innovations in management ideas and practices, which is based on the passive notion of *diffusion* (Rogers, 2003). Translation is a more fluid concept for exploring knowledge transfer (Freeman, 2009), focusing on the trajectories that management ideas take across space and time (Czarniawska and Joerges, 1996; Czarniawska and Sevon, 2005). It has developed out of actor-network theory and various forms of institutionalism - ‘old’, ‘new’ and ‘Scandinavian’, (Czarniawska and Sevon, 1996, 2005). Translation of management ideas involves them being turned into objects, in the form of books, guidance and presentations, so they can be communicated from place to place and adopted by organisations (a process of institutionalisation). The organisations can then use them as a basis for action. During its trajectories, there will be changes to the management idea, affecting both those who do the translating and those to whom it is translated (Czarniawska and Joerges, 1996). The analysis of what changes and what stays the same in the process of translation is an aid to explanation. For example, the Best Value reform in the UK was closely imitated in

Sweden without using the name, whereas in Victoria, Australia, the state government adopted the term but there were more differences than similarities in what was implemented. (Solli et al., 2005).

The concept of translation was seen to offer opportunities for explanation of the patterns of uptake of BM because it focuses attention on the complexities of the process of transferring knowledge. It allows for multiple meanings of concepts and the difficulties involved in translating from one language to another (Freeman, 2009). The phase ‘lost in translation’ is a commonly used one, while ‘found in translation’ conveys the notion of *discovery* which occurs when a management idea is first encountered by an individual and changes their approach to their work in some way. Both the person and the idea are changed in the act of discovery (Czarniawska and Joerges, 1996). Translation is therefore a particularly appropriate concept for analysing new management ideas, such as BM, which challenge existing organisational cultures.

Translation research has a cross-disciplinary focus (Freeman, 2009) and is relevant to many management fields, such as organisational change, innovation and learning, and institutional theory. It is itself continuing to evolve as a management idea (Spyridonidis et al., 2014) and be used in new research domains. A translational approach to organisational project management research is becoming more common (Drouin et al., 2014), but this has generally focussed on the translation of research findings into project management practice (Aubry, 2014) or the translation of other branches of strategic management theory into project management research contexts (Killen et al., 2014). This article is primarily concerned with the translation of management ideas into and within organisations and their adoption in management practice.

Only one example of BM research (Nielsen, 2013) has been found in the literature which refers to the bodies of theory associated with translation. Therefore, translation is used as a lens through which to analyse the evidence base on BM. Section 3 is concerned with the translation of BM over time, examining how BM has developed from its origins to the present day. It is based on surveys of the literature on BM and related themes, as well as the personal knowledge of the authors, whose perspective is informed in each case by their involvement in the historical development of BM. Section 3 uses the theoretical lens of translation to develop a layers/stages model of the development of BM over time. Section 4 builds on this model to incorporate an explicitly spatial dimension into the analysis of translation processes. Focusing at the global level, it explores the spread of BM across geographical and linguistic boundaries. Section 5 outlines the growing research interest in the adoption of BM and reviews studies which contain insights about the translation of BM at the micro-scale, even if a translation lens has not been used to underpin the research.

Research Method

This article is based on literature reviews, and the extensive practical experience of the authors, rather than new empirical research. Literature searches were undertaken using terms associated with benefits management, such as ‘benefit(s)’, ‘realisation’ and ‘management’, together with various combinations of ‘adoption’, ‘project’, terms to do with information technology, and ‘translation’. As almost no published research has been identified which analyses BM from a translation perspective, multiple literature searches had to be undertaken and sifted to identify relevant sources, after which snowball search techniques were employed, for example, on other publications of authors in this field. Because translation emphasises the role of management guidance as objects through which ideas travel, there is an emphasis on practice-orientated documents, often identified from government and professional body websites and practitioner networks, as well as academic books and journal articles.

This article uses translation theory to analyse the development of BM over time and across geographical space and draw conclusions about the processes which underlie its current usage. The principal mode of inference used to do this is abduction, rather than the more commonly recognised induction and deduction (Danermark et al., 2002). Abduction is concerned with the interpretation of phenomena in the light of a particular framework or theory to provide a deeper or more developed conception of the phenomena. It is also sometimes referred to as redescription or recontextualisation (Danermark et al., 2002). In this instance, the phenomena are the patterns of development of BM and the main framework is the theory of translation.

In abduction, the insights gained from the interpretations are inherently fallible. Their plausibility relies on creative reasoning and the ability to form associations, as well as a deep understanding of the phenomena and possible alternative frameworks for interpretation (Danermark et al., 2002). In this case, the common characteristic of the authors of this article is a longstanding interest in BM. Each of the authors has experience of more than one role from amongst the range of relevant roles in BM - consultant, trainer, author, examiner, practitioner and researcher – carried out in some cases in many different parts of the world. The plausibility of the conclusions from this article therefore rests largely upon the consensus the authors have reached from different, and deeply subjective, perspectives and experiences.

The research utilises many different types of information on BM, including both academic and industry-based sources. Some of the industry-based sources do not meet academic standards of validity and reliability in relation to the survey material collected.

Such sources are only used as further evidence to add to the results from academic sources in relation to a particular finding.

While our research method is predominantly based on the mode of inference of abduction, this article identifies priority areas for further primary research, which would utilise other modes of inference. This further research could be deductive, by turning the suggestions and propositions into hypotheses, or inductive, by researching the areas for further investigation without prior assumptions.

3. Translation processes and stages in the development of BM

This section will combine a chronological outline of the development of BM with reference to the main institutions involved in its spread, including consultancies, universities, governments, professional bodies and organisations practising BM. Four stages in the development of BM are identified, with a new layer being introduced into the translation processes for BM at each stage. The chapter concludes with a snapshot of the current position, combining the 'stages' and 'layers' into a model of the development of BM up to the present day.

<u>Stage 1 : 1990s: Benefits Management pioneers</u>

The early development of BM took place in the 1990's, largely by consultancy firms and business-orientated university departments who pioneered methods to address the failure of IT-enabled business change programmes. In many cases, the key individuals involved published their BM methods, but sometimes only some years after they were initially developed, when they had become tried and tested management tools. Examples of books emanating from this pioneering work include Bradley (2006, 2010), Payne (2007), Thorp (1998, 2003), Melton et al. (2008), Remenyi et al. (1997) and Ward and Daniel (2006, 2012). Generally, the different pioneers worked separately from each other, as consultants advising clients and sometimes also as trainers offering courses on BM. They developed methods which had slightly different names and emphases, but in many respects were quite similar. In every case, guidance was provided on the management of benefits over time, in the form of some kind of life cycle, from the original identification of benefits to their realization and maximisation in practice. Table 1 summarises approaches of the authors listed above, covering the terms used, the definitions of benefit, the essence of the management process and the business focus in each case.

Table 1 Benefits Management methods – a comparison of the approaches of the pioneers (in chronological order of the publication of the first edition)

Source	Method name	Definition of benefit	Definition of benefits management process	Business focus
Remenyi, D. and Sherwood-Smith, M. with White, T. (1997)	Active Benefits Realisation (ABR)	'IS benefits should…be seen as a composite of issues which deliver real business value to a number of stakeholders in the organisation (p6)	'ABR…. focuses on achieving the maximum value from information systems investment' (p7)	Information systems No explicit consideration of project, programme and portfolio levels
Thorp, J. and DMR's Center for Strategic Leadership (1998)	Benefits Realisation Approach	'An outcome whose nature and value (expressed in various ways) are considered advantageous by an organisation (p234)	Benefits Realization Approach is 'a business oriented framework, supported by a set of processes, techniques and instruments which enables organizations to select and	IT enabled change, although applicable to any major investment in organisational change (p38). Some case studies are non-IT, eg Boeing's recruitment

			manage a portfolio of programs such that benefits are clearly defined, optimised and harvested (p234)	policies (p218-220)
Bradley, G (2006)	Benefits Realisation Management	‘An outcome of change that is perceived as positive by a stakeholder’ (p18)	BRM is ‘the process of organising and managing, so that potential benefits, arising from investment in change, are actually achieved’ (p23)	All types of change projects and programmes. Explicit focus on both public and private sectors
Ward J. and Daniel, E. (2006)	Benefits Management	Categorisation of the different types of benefits from IT	BM is ‘The process of organising and managing such that the potential benefits arising from the use of IT/IS are actually achieved’ (p36)	Focus on IT/IS investments not just at the project level but also in a wider strategic context
Payne, M. (2007)	Benefits Management	Benefits are ‘measurable improvements resulting from outcomes’ (p3)	BM is ‘a process that defines the potential business benefits and financial impact of a project and ensures that these are achieved in practice’ (p3)	All types of change projects and programmes. Much of the experience of the author is in communications or IT systems and re-engineered business processes (p.iii)
Melton, T., et al., (2008)	Project Benefits Management	No specific definition of a benefit, but refers to the translation of strategic business goals into specific benefit categories	Project BM is ‘a business process which links the reason for doing projects with the business impact from their delivery (p3)	Focus on engineering projects within the process industries, but of generic application (p.ix)

Most of the pioneers were based in the UK. The main exception from the authors referred to in Table 1 was John Thorp/DMR, whose clients were mainly from Canada, the USA and Australia. Most of the projects that these consultants worked on in the late twentieth century were concerned with information systems or business change involving IS/IT. The client list often covered both public and private sectors, and generally involved large corporate organisations.

In addition to consultancy firms, the other main institutions involved in the early days of BM were universities, through their inter-linked research and consultancy activities in IT and related fields. The best known example is the work undertaken at Cranfield School of Management (Ward and Daniel, 2006, 2012). The ‘Cranfield method’, as it became known, was developed in the 1990’s and was then used by over 100 organisations in the next 10 years, based mainly in the UK, Europe and the USA (Ward and Daniel, 2006, 2012). Some of the other key figures from these early days were based at other UK business schools, such as Dan Remenyi at Henley, and universities in other European countries, such as Donald Marchand, at IMD, Switzerland, and Frank Bannister at Trinity College, Dublin. As organisations looked to develop a benefits realisation approach, they involved universities on a consultancy basis, to assist with the process and also to evaluate their initiatives. An example was the ‘All Wales Benefits Realisation Project’, sponsored by the Welsh Office, to develop an approach to BM for IS/IT investments in the National Health Service in Wales (Farbey et al., 1999).

The early days of BM therefore have a number of features which set the tone for its future development and uptake. It arose from the onset of new types of projects, business-related IS/IT investments, which were increasingly complex and for which the possibility of achieving no or marginal benefit was higher than for the engineering and construction fields which had previously been the mainstay of project management (Farbey, 1993; Bradley, 2006). As these challenges arose, many consultancies and universities specialising in project management, but working independently, developed management frameworks which were similar in nature but had no commonality in the title except for the word ‘benefit’. ‘Benefit’ had been used in previous investment appraisal techniques, such as cost/benefit analysis, but the management ideas coming from the pioneers of BM were qualitatively different from anything that had gone before, in the rigour attached to the conceptualisation of benefits and the integration within a programme/portfolio management context.

The word ‘benefit’ has some shortcomings as the defining term for a management idea. It has many different meanings in English, so there was much scope for confusion with, for example, employee benefits and the role of HR Departments. There was no unique term associated with the BM field, compared with, for example, Kaizen or Six Sigma, or single acronym to rival, for example, BPR or ERP. This meant that the central concept was particularly subject to interpretation and malleable in the process of translation. An illustration of this is the approach taken by the pioneers to the wider context in an organisation, beyond projects, programmes and portfolios. Payne (2007) included a ‘message for the CEO’, but that message was focused on the portfolio of change programmes. Bradley (2006) quoted a manager as saying ‘BRM is the glue that binds together all the other management techniques’ (p24), and in the 2010 edition he added a diagram to illustrate this (p32). Thorp’s (1998) starting point was the ‘information paradox’, the failure to obtain business value from IT, which requires an organisation-wide response.

Another key issue is the relationship between projects, benefits and value. A key principle behind Thorp's (1998) conception of the relationship between projects, programmes and portfolios was that the role of individual projects is to deliver capabilities that are necessary, but not sufficient to create benefits. It is the combination of all the necessary projects within a programme which results in benefits being optimised to create value. Portfolio Management then maximizes value across the portfolio of programmes.

It should be noted that the pioneers often produced second editions of their books which incorporated significant additions and/or changes to their conception of BM. For example, Thorp (2003) introduced the Enterprise Value Management view, which went further than the 1998 edition in positioning BM as a behaviour to be embedded across management domains.

BM was pioneered largely in the English-speaking world, in countries such as the UK, Canada and Australia, with some of the pioneers and their early followers working in the context of the wider development of project management in those countries, to incorporate the programme and portfolio levels. On one hand, this embeddedness should act to encourage the uptake of BM, since it is, to some degree at least, an added dimension to an established management practice, rather than a stand-alone management fad (Collins, 2012) or management fashion (Czarniawska, 2011). On the other hand, the extension of the scope of project management towards the strategic level could be viewed as encroachment into the roles of others, or dismissed as a project management 'add on'. The possibility of confusion on terminology is magnified by the association of benefits with other terms with multiple meanings, such as programme, portfolio and value. In these circumstances, the uptake of BM beyond the initial pioneer stage might be expected to be uneven, relying on a favourable institutional context.

Stage 2: late 1990s – mid 2000s : early consolidation into project management and IS/IT guidance

A central process in translation involving organisations is the objectification of management ideas (Czarniawska and Sevon, 2005). In the project management field, a key form of objectification is the publication of written guidance, usually requiring the production of many further documents if a particular process is to be undertaken in conformity to the guidance. Objectification was undertaken by consultants and universities in the early days of BM, in the form of, for example, guidance materials for training sessions and articles for academic journals. Organisations using BM may produce their own tailored guidance. However, these objects tend to have a restricted circulation and lower credibility in comparison with the guidance that is issued by governments and professional bodies. It may be the same pioneering consultants who are commissioned to write the guidance, often supported by a review panel, but the fact that it is published by a department of government or professional association gives it far greater weight.

As BM became more widely known in the late 1990s it attracted the interest of government departments and professional bodies involved in both project management and IS/IT. Sometimes the responsibilities of particular organisations covered both these two functions. One such organisation was the Central Computers and Telecommunications Agency (CCTA) in the UK, whose publication 'Managing Successful Programmes' was one of the first examples of BM being explicitly included in government guidance (CCTA, 1999). BM was part of the development and promotion of the programme level as a counter to the perceived failure of projects to realise benefits.

In the early 2000s government agencies in those countries where BM had been pioneered produced guidance which gave high priority to the value generated by ICT initiatives. Examples were the Value Measuring Methodology (VMM) in the USA, the Demand and Value Assessment methodology (D&VAM) developed by the Australian Government Information Management Office (AGIMO) and various initiatives in Western Europe (Jenner, 2009).

The influence of BM on government guidance and standards for the use of public money is another important area. In the UK, the reissue of the HM Treasury 'Green Book' in 2003 placed emphasis on the identification, management and realisation of benefits (Jenner, 2009). Another example was the adoption of the Investment Management Standard by the state government in Victoria, Australia (Jenner, 2010).

BM may be incorporated into policies and procedures which are mandatory for large parts of the public sector in a particular country. For example, BM is a key part of the Gateway Review process, first developed in the UK in 2001 to improve procurement decisions in the public sector and subsequently adopted in Australia, the Commonwealth, New Zealand and the Netherlands (Fawcett and Marsh, 2012).

As far as professional associations are concerned, once again there was interest in BM from the ICT side, as well as from project management associations. ICT organisations that have taken a keen interest in BM include the British Computer Society (BCS) and ISACA (formerly known as the Information Systems Audit and Control Association).

Project management professional associations divide between the Project Management Institute (PMI) and national associations, including, for example, the Association for Project Management (APM) in the UK and the Australian Institute of Project

Management (AIPM), which are members of the umbrella body, the International Project Management Association (IPMA) (Hodgson and Muzio, 2011). PMI's Standard for Program Management (PMI, 2006A) and Standard for Portfolio Management (PMI, 2006B) in their first editions were already recommending several activities associated to BM as part of programme and portfolio management processes. In the UK, the Body of Knowledge 5th edition (APM, 2006) recommended BM to be applied as part of any project and programme lifecycle, emphasising its relationship with project success.

The professional associations work with international standard setting organisations, such as the International Standards Association (ISO) to gain recognition for the bodies of knowledge and develop new standards (Hodgson and Muzio, 2011) Professional bodies also have a key role in the development and management of qualifications in project management, and BM became one of those skills covered in the qualifications available, especially at the programme and portfolio management level (see Letavec, 2014, for a sample of questions related to benefits realization from the Program Management professional (PgMP®) examination)

The inclusion of BM in guidance places the onus on organisations to incorporate BM into their practices. However, based on translation theories, this cannot be taken for granted. Various barriers may prevent the organisation from institutionalising the ideas associated with BM. Even if the idea is accepted within the organisation, it may not be acted upon in a specific situation (Czarniawska and Joerges, 1996). A key role in this process may be played by Project Management Offices (PMO's), in disseminating best practice and ensuring that projects are delivered accordingly. However, in the mid 2000s the level of importance given to BM by PMO's was limited, according to a report prepared for the PMI (Hobbs, 2006). In this survey covering primarily North America and Europe, only

28% of PMO’s identified BM as a PMO function (Hobbs, 2006, p10), which was third from bottom out of 27 possible PMO functions.

Stage3 : mid to late 2000s : networks for best practice and maturity models

By the mid-2000s, the main English-speaking countries had incorporated BM into the central guidance in the project management field sponsored by governments and professional bodies. This guidance has been refined as new editions of the key publications have been issued, but the key characteristics of the next phase in the development of BM have been the widening of the networks associated with the field and the development of models to assess the capabilities of organisations and their maturity with regard to BM.

Within professional bodies the development of Specific Interest Groups (SIG’s) has provided the opportunity for practitioners, consultants and academics to work together to develop and promote BM. Often such issues have been addressed in groups covering the more strategic aspects of project management, such as programme management, portfolio management and the role of Programme Management Offices (see Letavec, 2014, for illustrations of this from the PMI in the USA). In the case of the APM, there is a dedicated BM SIG, which was founded in 2009 and had grown to around 1,300 members by 2014.

Social media have provided new and very flexible opportunities for collaboration. In particular LinkedIn provides the opportunity for practical issues faced by both beginners and experts in BM to be opened up to a specialist audience for advice and support.

These networks mean that the processes of translation of ideas associated with BM have become much more diverse. Practitioners may obtain much of their knowledge of the field through Continuing Professional Development (CPD) with professional bodies. They may be in the habit of using social media to find out about the latest ideas, in addition to the more traditional training courses and 'learning through doing' in the workplace.

With the growth of BM guidance and networks, attention has turned to examining the extent to which BM has become a norm for organisations in the way that they manage projects. As well as academic research (Ashurst et al. 2008; De Haes and Van Grembergen 2008; C. Lin et al. 2005; K. Lin et al. 2005; Naidoo and Palk 2011; Schwabe and Banninger, 2008; Smith et al. 2008; Ward et al. 2007), large commercial research organisations, such as Gartner, have published reports on BM, often focusing mainly on ICT investments (Gartner, 2011). Surveys have also been undertaken through professional association SIG's (APM, 2010; APM, 2012). The consistent message from these different sources was of a low level of utilisation of BM practices. Even where BM is accepted within an organisation, there may be limited application in practice, or the approach may be watered down (Doherty et al. 2012). According to translation theories, this is not surprising. The translation of a management idea always changes it, with the culture of the organisation dictating whether it is implemented in a manner which follows the guidance closely or not.

This concern that BM fails to impact on the way that organisations undertake projects has been associated with the development of models which attempt to capture the capabilities required for an organisation to undertake BM effectively (Ashurst et al., 2008). These capabilities can form the basis for maturity models against which organisations can assess their current position and progress over time (Ashurst and Hodges, 2010; Gartner, 2011). Research studies have often found that there is a ‘knowing–doing’ gap (Pfeffer and Sutton, 2000), with practitioners acknowledging their inability to emulate good practice (Ashurst and Hodges, 2010). This raises questions as to how they know what ‘good practice’ is and why they are unable to match up to it.

Capabilities for benefits management and maturity models provide a further resource for translation of BM, generally most relevant to those organisations already using it. These models allow for contextualisation within the organisation’s environment as they are generally not tied to a specific method for undertaking BM.

Stage 4 : 2010s : specialist accreditation in Benefits Management

A process which started in the 2010s and would be expected to gather pace over the decade is the development of qualifications specifically in BM and the incorporation of BM as a standard requirement in the education of project managers. The development of industry qualifications depends very much on judgements as to what is commercially viable. In the UK, the responsibility for project management qualifications rests with organisations such as Axelos and APMG-International. APMG-International identified an opportunity based on the growing interest in BM and commissioned certificates at foundation and practitioner level, launched in 2012 and 2013 respectively.

The development of qualifications in BM constitutes a further objectification of the management idea. In providing the opportunity for practitioners to demonstrate their skills and aptitudes against the ‘Managing Benefits’ guidance (Jenner, 2012) by passing an exam, the qualification is encouraging adherence to particular standards and behaviours by practitioners involved in BM.

As well as industry qualifications, the courses in project management run by higher and further educational providers also play a key role in the preparation of practitioners. However, BM has tended to have made limited inroads into the curriculum for project management. For example, amongst the courses in the UK at masters' level accredited by the APM there were none with a module including the word 'benefit', based on the information on their websites in the summer of 2014. However, many had modules on programme and/or portfolio management, where BM content may be included.

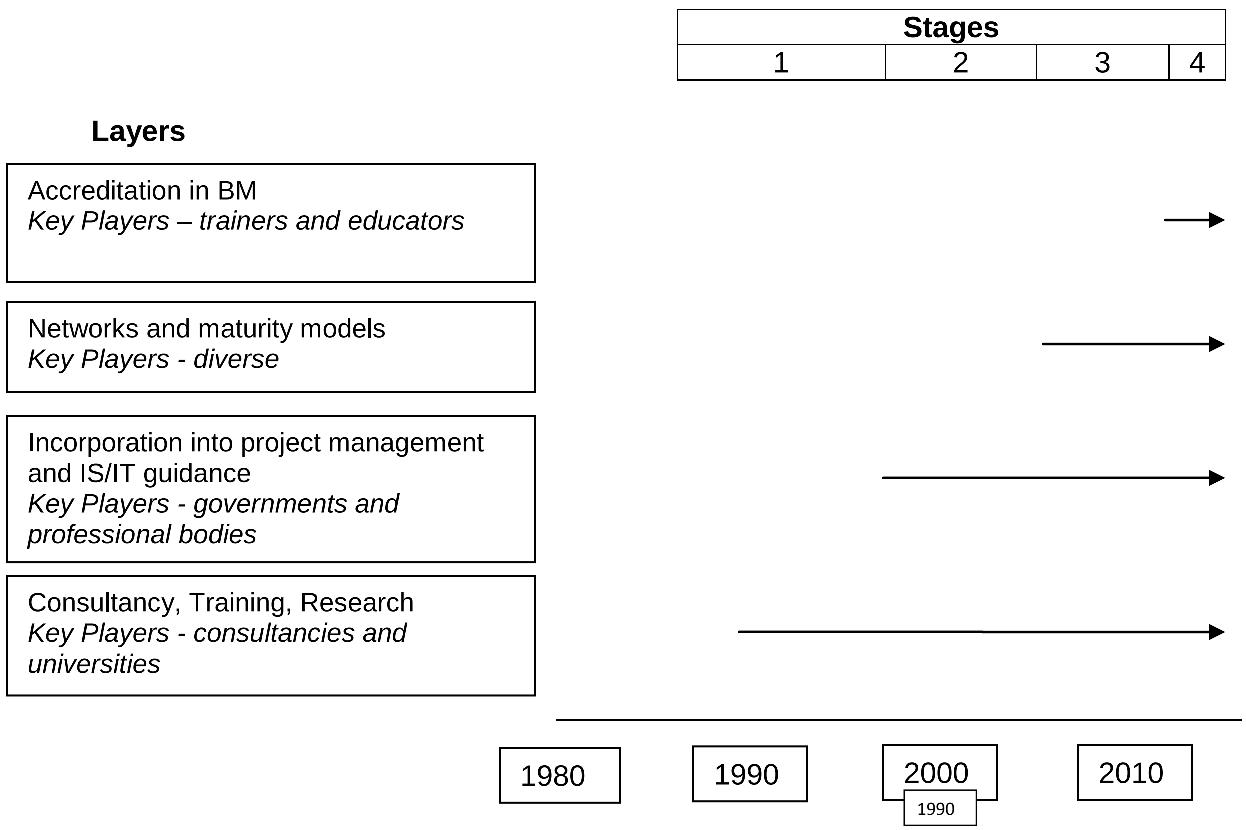
Practitioners who have studied BM in higher or further education courses, or who have taken the bespoke qualifications in it, may have an enhanced status as specialists in BM within their organisations, and hence be in a position to be a champion for BM in the translation process.

The stages and layers model of the development of BM

The analysis above suggests that the development of BM can be categorised into different stages, each of which adds complexity to the context for translation processes. The stages described above are not offered as a definitive categorisation of the development of BM, but rather as a plausible way of distinguishing qualitative differences over time in its evolution up to the mid-2010s, which helps to identify the range of different influences on organisations when they are touched by the trajectories of the management idea of BM.

Since the activity identified in each of the four stages continues to the present day, the model of the development of BM needs to incorporate 'layers' as well as 'stages'. Figure 1 shows in diagrammatic form how at each stage there is a cumulative build up of layers in the resources and actors involved in the translation of BM.

Fig. 1 The layers and stages of development of BM



Regarding the impact of the lower layers in Figure 1, the research and consultancy work in Stage 1 and the development of guidance and standards in Stage 2 have continued to develop in recent years. It has already been noted that often the methods promoted by the pioneers of BM were only published many years after they were originally developed, so there was a delay in those methods reaching a wide audience. As well as the continuing involvement of the pioneers in the field, some of those they trained have themselves become consultants in the field, and a wider range of project management consultancies have included BM within the areas in which they claim expertise. New ideas within the field of BM have emerged from university research, such as the concept of ‘worth’ (Zwikael and Smyrk, 2011). BM has been applied in particular fields, such as government ICT programmes (Jenner, 2009), and new publications have linked BM into the guidance from professional bodies, such as Letavec’s (2014) alignment of strategic benefits realisation with the PMI Standard for Program Management. The range of management ideas from consultancies and universities related to BM therefore continues to grow, and they are turned into objects, such as books and on-line materials, for the purpose of translation to individuals and organisations involved in BM practice.

With regard to recent developments in the second layer up in Figure 1, the role of governments and professional bodies continues to evolve with new editions of the key publications, new layers in the guidance and standards frameworks and shifting responsibilities between institutions. Critical to the translation of BM is the degree of emphasis given to it and the consistency between the different guidance documents from a particular source. For example, an analysis of the number of times ‘benefits’ and ‘benefits realization’ appear in successive editions of the PMI PMBoK and Standard for Portfolio Management show a reduction from previous editions in the inclusion of these terms in the documents issued in 2008, but then a huge increase in their use in the 2013 editions. The Standard for Programme Management is more consistent in its utilization of the terms across different editions, and is the only one of the three which uses the term ‘benefit(s) management’ with any regularity (PMI, 2006A, 2006B, 2008A, 2008B, 2008C, 2013A, 2013B, 2013C).

Implications of the stages and layers model

The stages and layers model demonstrates how, as time has gone on, the range of different sources of information and guidance on BM has grown, so that by the mid-2010s it includes training courses, consultancy services, research and evaluation studies, government guidance, professional body guidance, capability and maturity models, professional body networks, social media networks, bespoke examinations and higher education qualifications. Thus the range of influences on an organisation, or even on an individual, are increasingly diverse but inter-related in complex ways. On the one hand, this provides new opportunities for those promoting BM, with a mushrooming of different kinds of translation processes. On the other hand, it increases the likelihood of different emphases and interpretations of what BM involves amongst different individuals and groupings within an organisation, depending on the degree of alignment of the various sources of information and guidance.

4. Translation of BM across geographical and language boundaries

The stages and levels model of the development of BM is primarily concerned with changes in translation processes over time. The concept of trajectories of travel of management ideas (Czarniawska and Sevon, 1996) incorporates the dimensions of both space and time, so this section covers some of the key patterns in the geographical spread of BM at the global level.

The previous section has shown that BM has developed mainly in the English-speaking world. Therefore, a key issue for the geographical spread of BM concerns the influence of language. The impact of this factor will be different in countries where English is commonly used in business, compared to those where the only option is to translate BM guidance into another language.

The influence of language affects not only the adoption of BM in business but also the accessibility of the literature on BM, as the sources available to the authors are, obviously, determined by our mastery of languages. While academic sources on BM management practices conducted in other languages are often written in, or translated into, English, the situation is more variable for practitioner-orientated guidance. Sometimes the guidance developed in non-English speaking countries is also available in the English language. For example, the Japanese 'P2M Project and Program Management for Enterprise Innovation' guidance (Project Management Association of Japan, 2008) places benefits at the centre of both project and programme management. However, often the guidance developed in native languages will have been influenced by English language publications but will not be translated back into English afterwards, as is the case with the Swedish Government's guidance on benefits management. (Jafari, 2014). Mastery of languages constrains any academic study, but it is highlighted here because it is a particularly biasing factor when investigating the geographical spread of management ideas.

This section begins by reviewing the take up of BM qualifications in different parts of the world. It then summarises the findings of studies which have sought to compare BM practices in different countries,to draw inferences on translation processes across geographical and linguistic boundaries.

The foundation and practitioner-level certificates in BM from APMG-International are marketed and delivered globally, so the global pattern of uptake of the new qualifications provides an indication of concentrations of interest in BM. Trainers are accredited on a country-by-country basis so the delivery of training is organised and regulated geographically, and can potentially be offered anywhere in the world. However, currently the exams have to be taken in the English language. Relevant data includes

- the locations of trainers in BM (APMG International, 2014A) and ‘train the trainer’ events,
- the locations and type of work of those sitting the qualifications (APMG International, 2014B), and
- the locations of participants in the LinkedIn ‘Managing Benefits’ Group (LinkedIn, n.d.)., which was set up to complement the guidance document.

In 2014 there were 38 Accredited Training Organisations involved in delivering the foundation and practitioner qualifications in BM (APMG International, 2014A). These included 12 in Australia; 6 in the UK; 4 in the Netherlands; 3 in S Africa; 2 in the USA and in India; 1 each in Sweden, New Zealand and Brazil. ‘Train the trainer’ events had been held in the UK, Australia, Netherlands and the USA.

Analysis of exam data up to May 2014 (APMG International, 2014B) gave the following locations: UK 46%; Australia/NZ 34%; Europe (Sweden, Netherlands, Italy, Poland, Belgium, Germany) 8%; S Africa 6%; US & Canada 5%; India 1%. The sector of the participants was: Public 56%; Private 40%; Other 1%; Not stated 3%.

The Linkedin ‘Managing Benefits’ Group was set up in June 2012, and as at March 2015 there were 1,666 members. The most popular locations were given as : London 9%; Brisbane 7%; Sydney 5%; Melbourne 3%; Perth 3%; Copenhagen 3%. In terms of the function of the individual involved, the most commonly mentioned were : Project and programme management (29%); Consulting (12%); Finance (5%); Business Development (3%); Entrepreneurship (3%); IT (3%).

All these sources of information point to the UK and Australia being the countries where the infrastructure for accreditation is most developed and interest in the qualifications is highest. Secondary areas include North America, with a ‘train the trainer’ event having been held in Chicago recently, and other English-speaking countries, such as South Africa and New Zealand. Another secondary area is Western Europe, including the Netherlands and Scandinavia. In other parts of the world there would appear to be less activity in the accrediting of professionals in BM so far.

It might be hypothesised that the patterns of uptake of the new qualifications are indicative of broader interest in BM and would correlate with the utilisation of BM practices on a country-by-country basis. There is limited evidence on this issue, but what is available suggests that utilization of BM practices is low everywhere, and varies less than might be expected between countries.

Some studies of BM practices in one country have compared their results with other published studies of organisations in other countries. For example, K. Lin et al. (2005) undertook research on IS/IT investment evaluation and benefit realisation practices amongst SME’s in Taiwan, and compared their findings with studies in Australia and the UK. Widespread use of BM was found in about 20% of their sample, which was similar to the result from Lin et al.’s (2003) research on large Australian organisations. However, the lack of comparability of studies which used different methods and were undertaken at different times is a limiting factor.

More reliable comparisons can be obtained from studies which have undertaken empirical research on BM practices in organisations based in different countries, but there are few published studies of this type (Serra and Kunc, 2015; Ward et al, 2007). Even where the sample includes organisations from different countries, it may be found that no statistically significant differences can be found by country, so the results are not disaggregated in this way. An example is Ward et al.'s study (2007) of the benefits of IS/IT investments in organisations from the UK and the Benelux countries.

One piece of empirical research that has published data by country is a study which compared BM practices in the UK, the USA and Brazil and related them to measures of project success (Serra, 2015; Serra and Kunc, 2015). The research data was collected from 331 practitioners, who had had a role on a project that was concluded sometime between 2010 and 2012. 295 of these were from one of the three countries. Respondents were asked to assess the project against 12 BM practices within four sets identified from the project management literature and practitioner guidance (Table 2). The questionnaires used with Brazilian participants were in Brazilian Portuguese, with prior piloting with control groups in order to avoid the misunderstanding of specific words and other project management terms.

Table 2 BM Practices Adapted from Serra and Kunc (2015)

Group 1 **Planning**	**Group 2** **Review**	**Group 3** **Realisation**	**Group 4** **Strategy**
BM1: Each initiative has its expected outcomes clearly defined.	BM5: Project outputs and outcomes are frequently reviewed and realigned to the current expectations.	BM8: Project scope includes activities aiming to ensure the integration of project outputs to the regular business routine.	BM11: A BM strategy defines the standard procedures for the whole organisation.
BM2: Project outcomes create a measurable value to the organisation.	BM6: Project reviews are frequently communicated to the stakeholders as well as their needs are frequently reassessed.	BM9: Project outcomes are monitored by the organisation after project closure in order to ensure the achievement of all benefits expected in the business case.	BM12: A BM strategy defines the standard procedures for the project under analysis.
BM3: Project outcomes support the achievement of clearly defined strategic objectives.	BM7: Project outcomes adhere to the expected outcomes planned in the business case.	BM10: The organisation works in a pre-planned and regular way to integrate project outputs into the business routine from the first delivery to the project's closure.	
BM4: Expected outputs, outcomes and benefits are described in the business case and			

approved at the beginning of the project.			

It might be expected that, amongst the three countries, the UK would have the highest adoption of BM practices. It was the origin of much of the pioneering consultancy and research work, with relatively strong professional networks and a high take-up of the APMG-International qualifications in BM. The USA has been less committed to BM hitherto than the UK, and Brazil is a latecomer to BM, in common with much of the world where English is not the main language of business.

It might be anticipated that language would be a barrier to the adoption of BM in Brazilian organisations. Portuguese is the main language of business in Brazil, with comparative studies suggesting a relatively low proficiency in business English (Pearson English, 2014). Many project professionals in Brazil are certified or associated with the PMI and there is a Brazilian Association for Project Management, associated to the IPMA, but much of the standard guidance is not translated into Portuguese. As an exception to the rule, PMI's PMBoK fifth edition (PMI, 2013C) has been translated to Portuguese as well as to several other languages (PMI, 2014). The same has not hitherto happened with publications produced by other organisations such as APM (APM, 2014), IPMA (IPMA, 2014) and APMG (APMG International, 2014C), although APMG International has a website in Portuguese and provides training in Brazil through Portuguese speaking training providers.

Despite the differences between nations in the uptake of BM qualifications and the availability of guidance in the usual language of business, one of the clearest messages from the data was the similar levels of utilisation of the 12 practices across the three countries. Variances between countries were found for only three out of the twelve practices when assessed by the Kruskal-Wallis test (Serra and Kunc, 2015). These practices were; BM2: Project outcomes create a measurable value to the organisation, BM3: Project outcomes support the achievement of clearly defined strategic objectives and BM7: Project outcomes adhere to the expected outcomes planned in the business case.

The variances between countries for these three BM practices are more likely to be due to other factors, such as the proportion of projects of an operational nature, rather than differences between nations (Serra, 2015). Rather, the more significant point is that despite the UK being at the forefront of developments in BM, there were no BM practices which the UK organisations were using more than their counterparts in the USA and Brazil (Serra and Kunc, 2015).

In conclusion, evidence on the geographical spread of BM suggests that there are clear concentrations of knowledge and best practice in the English speaking world, particularly in the UK and in Australia. Evidence as to why this should be the case is limited, but from a translation perspective a key factor is likely to be the strength of the promotion of BM by government agencies in the two countries, including the sharing of good practice between them, in Stage 2 of the stages and layers model (Figure 1). For example, the first transfer of the Gateway Review process from the UK was to Victoria, subsequently followed by three other State governments in Australia (Fawcett and Marsh, 2012).

Comparative cross-national evidence on the use of BM practices is very limited, with a heavy reliance in this section on a single study, of the UK, USA and Brazil (Serra and Kunc, 2015). However, on the limited evidence available, the incidence of utilisation of BM practices across a broad sample of projects, rather than focusing on organisations in the vanguard of best practice, does not seem to be skewed to those countries at the forefront of the development of BM. Hence, geographical and linguistic boundaries may not be acting as major barriers to the spread of BM. However, it should be noted that this does not necessarily mean that BM will be implemented in the same way on a global basis. In other project management contexts, researchers have identified variations between practices in different countries (Müller and Turner, 2004; Müller et al., 2008; Zwikael, et al., 2005), so it would be expected that the same would apply to BM.

5. A research agenda on the adoption of benefits management

So far this article has identified the stages in the development of BM over time, and the current patterns of uptake at a global level. The macro-scale position is the sum total of all the translation processes at the level of organisations and individuals, about which not very much is known. BM is an underdeveloped area of research, as discussed in the introduction, and what recent research there is has been primarily concerned with the practices undertaken (see, for example, Ashurst, 2012, Serra and Kunc, 2015).

The focus on practices, in ICT at least, arose from case study research which identified that espoused methods had little influence on the development of information systems. Instead, they were a 'necessary fiction', used by managers to give the illusion of a controlled and orderly process (Nandhakumar and Avison, 1999). Research on BM practices is required in order to assess the impact of BM in addressing the 'Information Paradox' (Thorp, 1998), challenging the technocratic approach to IT investments (Ashurst, 2012).

The focus on practices has revealed the low take up of BM, and led to the emphasis on organisational capabilities and behaviours for BM, as discussed in Section 3 of this article. However, it is also being recognised that it is necessary to focus more specifically on the adoption of BM, and the organizational changes involved, in order to identify the underlying reasons for its limited impact (Hesselmann and Mohan, 2014).

Hesselmann and Mohan (2014) draw on Leavitt and Bahrami's dimensional framework for analysing organizational change to review research evidence from four different, but inter-related, perspectives; BM frameworks and methods (technical perspective), BM users (humanistic perspective), BM governance (control perspective), and BM context (organisation perspective).

Hesselmann and Mohan (2014) review the literature to identify a number of factors which influence the adoption of BM, such as industry sector, company size, and the scope of IT investments, and factors which will influence the effectiveness of BM, such as clear roles and responsibilities, governance structures for cross-boundary collaboration and an organisational culture conducive to BM. Relating such factors to translation processes occurring in practice would help to build up the evidence base on the adoption of BM and its resultant impact. Examples from the literature will therefore be used to demonstrate the potential of a translation lens. First, it is necessary to review the research evidence on the spread of BM methods at the level of the organisation.

Most articles on BM include a summary of BM methods as part of the introduction to their research. The method most commonly referred to is the Cranfield approach (see Ward and Daniel (2006, 2012) in Table 1 above), highlighted as a dominant method in research studies on BM in many different countries, including Denmark (Nielsen, 2013), Germany (Mohan et al., 2014), Norway (Hellang et al., 2013), southern Africa (Naidoo and Palk, 2011), Switzerland (Schwabe and Ballinger, 2008) and Taiwan (K. Lin et al., 2005). However, in the studies referred to above, specific examples of the Cranfield model being adopted by the organizations being studied are few and far between. Instead, the Cranfield approach is often employed in a similar manner to its use by Ward et al. (1996) and Ward et al. (2007), as a benchmark against which to assess BM practices (K. Lin et al., 2005, Braun et al., 2009; Coombs, 2015).

One of the reasons why research studies have tended to skirt over the adoption of BM methods may be that BM is part of the tacit, rather than codified, knowledge resources (Nonaka and Takeuchi, 1995) in some organisations. Hesselmann and Mohan's (2014) review of research on BM frameworks and methods highlighted the finding in many of the studies that few organisations were using a formal BM process. Where this is the case, the questions left unresolved are how the organisations came to be using BM practices and what mindset underpins these practices.

It would be expected that as BM develops as a management idea the proportion of organisations adopting a recognised method as a result of a translation process of BM as a management idea would increase. An example of a study which explored how BM methods have developed in a particular context is the research by Hellang et al. (2013) on the approaches to BM in the public sector in Norway, which refers to the Cranfield model (they call it the British benefits management model (BMM)) as having inspired the Norwegian methods. Hellang et al. (2013) reviewed six different methods for BM in use in Norway, which all have their origins in the BMM. They categorised them into three distinct approaches on the basis of shared common features; the benefits management approach, the justification planning approach and the portfolio management approach. What they did not explore was the processes involved in the metamorphosis of the BMM into these three different approaches. To explore such issues using a translation lens would focus on the changes occurring to the BMM during the trajectories in space and time which led to the three different Norwegian approaches being created and used in practice.

Some clues as to the translation processes at work in the adoption of BM by public organisations in Norway are found within prior research which was concerned with the key issues affecting the adoption of BM (Paivarinta et al., 2007). This study sought to identify the factors which would encourage the adoption and implementation of BM for IT investments in local government in Norway, using a Delphi research method. The main issues were perceived to be cultivating an organisational culture towards BM, organising the BM process and how to choose appropriate methods and tools. However, this study did not relate the factors identified to existing practices in the respondents' organisations in a systematic manner, so it is not clear what impact the factors identified had had in practice. For example, there was a request for techniques that were easy to learn and to use, but no evidence was provided that the complexity of the tools available had actually prevented BM being adopted in specific contexts. Furthermore, the Delphi panellists had no specialised expertise in BM before the study. Therefore, the study by Paivarinta et al. (2007) provides insights on the factors which might affect translation, but does not cover the translation processes actually happening.

One case where translation processes have been explicitly explored concerns an action research study of BM in a cross-departmental information system project in a local municipality in Denmark (Nielsen, 2013). This study was concerned with the boundary spanning activities of actors and objects over the life cycle of the project, to ensure that the objectives of the project would be realised. The study found that at different stages different actors and objects played a critical role in the translation of knowledge across organisational boundaries, to contribute to the eventual maximization of benefits.

However, this example is only concerned with a single project, and does not explore the BM methods used in that organisation and how they came to be utilised there.

To summarise this section, as researchers have started to recognise the importance of the factors influencing the adoption of BM to explain the low patterns of usage, an evidence base is starting to develop on the transfer of BM between and within organisations, albeit mainly in the IS/IT-enabled change field in the public sector in Scandinavia. However, at this stage there is limited empirical evidence on the introduction of BM into organisations and its subsequent usage in those organisations, to test the propositions on the factors conducive to its uptake and use. Fruitful avenues for further research will be suggested at the end of the next section, taking account of the wider implications of this article.

6. Implications for the future spread and usage of BM

Within the institutionalism literature, there is a distinction drawn between management ideas which become institutionalised as part of taken-for-granted management practices, and hence survive across generations, and management ideas which fail to achieve that level of acceptance and fade over time in the manner of a transient fashion (Greenwood et al., 2002). While such a distinction has been criticised as over-simplistic in the translation literature (Czarniawska, 2011), it is useful to consider whether the trajectories of BM over space and time up to the present day suggest that it will continue to build momentum.

The triggers which led to the emergence of BM – appraisal of IT investments and closing the gap between projects and organisational strategy – have not lost their salience. The failure rate of IT-enabled investments is still a concern (Standish, 2013) and the development of the programme and portfolio levels within the project management field has continued apace (Letavec, 2014; Morris, 2011;). The layers and stages model of the development of BM has demonstrated the steady growth in the breadth of actors and objects involved in the translation of BM. BM has made strong inroads beyond the English-speaking world, with language barriers seemingly not being an insurmountable constraint on its translation as a management idea in, for example, Taiwan (K. Lin et al., 2005) and Brazil (Serra and Kunc, 2015). However, the evidence available so far suggests that BM has achieved limited penetration, even in those parts of the world in the vanguard of its development, such as the UK (Serra and Kunc, 2015). This suggests that there may be some serious barriers affecting its adoption.

BM operates at different levels, as a way of thinking which needs to be reflected in the mindset and behaviours of an organisation and also as a set of management practices and techniques. This reflects a distinction between programmatic and technical elements which is a characteristic of many management ideas (Sahlin and Wedlin, 2008). This means that it is important to identify the translation processes occurring, rather than drawing inferences from the practices being undertaken. It means that BM practices may be used as a result of the prevailing organisational culture, even if no formal method has been adopted, as Hesslemann and Mohan's (2014) review of the evidence base found has been common in the past. It also means that BM methods and techniques might be utilised without full commitment to the underlying principles, particularly where it is part of a mandatory requirement. There is a body of evidence from translation research around the theme of organisations paying lip service to management ideas without it impacting on actual organisational practice (Meyer, 1996). The idea that systems and processes in organisations may be built around the justification of courses of action already decided on is not a new one, whether it be accounting systems (Burchell et al., 1980) or the more general collection of information (Feldman and March, 1981).

The nature of BM may therefore lead to ambiguity on the scope and role of BM, which is not helped by the multiple meanings of the terms ‘benefit’ and ‘value’. If the findings of Paivarinta et al. (2007) are representative, decision-makers on the introduction of BM will be looking for methods which are easy to use and produce straightforward results. They will also look for clear responsibilities and inter-professional cooperation, while many research studies have reported that organisations have found it challenging to integrate BM into their policies and processes (De Haes and Van Grembergen, 2008; Doherty et al., 2012; Naidoo and Palk, 2011). Contextualisation of BM in specific organisational settings and the governance structures required for its successful implementation have been identified as major challenges (Hesselmann and Mohan, 2014).

The implementation of BM at the project level has also been found to be challenging, with organisations not appreciating the change management skills required, particularly for IT-enabled change (Coombs, 2015). Embedding BM within organisations will only happen where the benefits of doing so are recognised, perhaps in the form of ‘short term wins’ (Kotter, 1996). Since BM is often introduced within the framework for project management, the findings of Fernandes et al.’s (2015) study into the key embedding factors for project management improvement initiatives (PMII’s) are relevant. They found that ‘demonstrating the PMII value’ was the most important factor. There is a clear logic in expecting to be able to demonstrate the benefits from the adoption of benefits management! The potential for BM to be ‘found in translation’ or ‘lost in translation’ does not take place at a single point in time, but at any stage from its initial introduction to the organisation to the point where it could be considered to be fully embedded.

Future research questions on the adoption and embedding of BM using a translation lens might include

- how do organisations first find out about BM, and how is knowledge about BM spread within that organisation?
- what are the key factors which determine whether and how BM is explicitly used in an organisation and who makes the decisions?
- how does the management idea of BM change as it is translated into specific organisational contexts?
- are there any common patterns in the scope of BM usage and commitment across an organisation, eg is it limited to programmes and projects with an IS/IT element in most organisations?
- how easily does BM fit within the approach to project, programme and portfolio management in organisations?
- how easy do organisations find it to build commitment to BM over time, and embed it in their processes?
- what is the relationship between organisational culture, specifically one orientated towards value, and the use of BM methods and practices?

There are many areas within project management research which tie in with the theme of translation of BM, such as governance and knowledge management, and the translation of BM is intertwined with that of other linked developments, such as the increasing emphasis on programmes and portfolios. There is a need to bring together the evidence on the translation of BM with that from the wider project management literature, also utilising wider management theory, such as models of organisational learning (eg Crossan and Berdrow, 2003). Comparison of BM with other management ideas associated with improvements in performance in the project management field, such as Agile methods (Serrador and Pinto, 2015), could yield useful insights on the barriers to the adoption of BM.

In conclusion, this article has told a story of the historical development of BM to the present day, through the lens of translation. It suggests that an approach to the spread of management ideas which takes as its starting point that the utility of that management idea has to be 'found in translation' is a helpful one for practice, for those whose goal is to promote the use of BM, as well as for research purposes.

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