



NCDIT Enterprise Project Management Office Phoenix Project Management System

Document Type	Phoenix Screen Aid
Title	Benefits
Revision	1.0
Effective Date	10/19/26

1.0 SCOPE

This document assists with entering field-level information into the Benefits screen in the EPMO Phoenix Project Management System. The purpose of entering this information is to elaborate upon the positive outcomes a project delivers. Benefits may be either tangible (quantitative) or intangible (qualitative) but should be able to describe the value they bring forth once realized.

An IT project must demonstrate some level of value returned for the investment made. Benefits are required to submit for a Business Case and must be actively managed and maintained as a function of ongoing applied project management.

2.0 COMMON

- The Project Manager (PM) is responsible for all data entry and ensuring the project is completely represented in Phoenix and kept current.
- When unsure, consult with your Project Management Advisor (PMA) for any project related questions or data entry selections. Your PMA will periodically review this information and may recommend changes.
- The contents of this document cover the fields in the Benefits screen. Other fields may contain information already populated from elsewhere within Phoenix and inherited here.
- Open your project at [NCDIT EPMO Project Governance & Oversight](#).
- Fields icons:

*	Required – no saving or advancing until data entry is satisfied.
🔒	Locked – no data entry is allowed.
▼	Dropdown – click on icon to select from list.
🔍	Search – click on icon to engage search function.
📅	Date – click on icon to engage calendar selection.
🔗	Go to Record – click icon to edit record.

- All other fields are text entry and have edit and length limitations based on purpose or a project's workflow phase.
- ALWAYS Save!

3.0 BENEFIT DATA ENTRY

An IT project benefit is a positive outcome created by implementing new technology, improving existing systems, or optimizing digital processes. Benefits generally bring value through IT project deliverables by improving how the organization may operate by means of technology adoption or deployment. Common benefits include new or modernized services, increased efficiency, reduced operational costs, stronger security, improved data accuracy, and enhanced user or customer experiences. By modernizing systems or introducing new digital capabilities, an IT project helps the organization work faster, make better decisions, and maintain expected levels of stewardship.

Benefits should be reasonably estimated through reproducible means, i.e., a sound Basis of Estimate. Benefits that are either cautiously small or excessively large may need to be adjusted.

Once established, a Benefit is editable and may be deleted if no longer applicable due to project change.

3.1 General



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Benefit Title	A concise formal name used to easily identify a benefit associated with a project. This field is required and editable and is limited to 60 characters.
Date Benefit Starts	The date associated with the commencement of stated value derived from an identified benefit after a deliverable, or multiple deliverables, has been met. Some benefits may begin before project completion; thus, start dates should be specific to the benefit and not just a project's end date. This field is required and is editable.
Benefit Type	Select the type from the provided list: • Qualitative – A positive outcome of an IT initiative that cannot be easily measured with numbers or expressed in monetary terms. These benefits describe improvements in areas such as user satisfaction, process quality, communication, decision-making, or organizational culture. They rely on observed or perceived enhancements rather than quantitative metrics. • Quantitative (Hard #) – A measurable, data-driven outcome of an IT initiative that can be expressed numerically, often in terms of productivity improvements or time reductions. These hard benefits are supported by clear, reproducible, evidence-based numeric metrics that make them easier to track, verify, and incorporate into various analyses or business cases. • Quantitative (Hard \$) – A measurable, data-driven outcome of an IT initiative that can be expressed financially, often in terms of cost savings or revenue gains. These hard benefits are supported by clear, reproducible, evidence-based financial metrics that make them easier to track, verify, and incorporate into financial analyses or business cases. • Quantitative (Soft #) – A measurable improvement resulting from an IT initiative based on estimates, assumptions, or indirect metrics rather than guaranteed or directly observable data. These benefits can still be expressed numerically, such as projected time savings or anticipated reduction in error count, but they rely on interpretation or modeled data rather than hard evidence-based numbers. • Quantitative (Soft \$) – a measurable improvement resulting from an IT initiative based on estimates, assumptions, or indirect metrics rather than guaranteed financial data. These benefits can still be expressed as dollars, such as reduced material cost or a reduction in labor, but they rely on interpretation or modeled data rather than hard evidence-based financial figures. This field is editable.
Benefit Description	A clear, concise statement that explains the specific positive outcome a project's Benefit is expected to deliver. It outlines what the benefit is, who it affects, and how it improves processes, performance, or value for the organization. A strong benefit description should: • State the benefit in plain language; • Identify the impacted stakeholders or processes; • Describe the nature of the improvement (qualitative or quantitative); and, • Provide enough context to understand why the benefit matters. This field is editable and is limited to 4000 characters.



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Basis of Estimate (BOE)

A detailed explanation of how a project's Benefit estimate was developed, including the data sources, assumptions, methods, constraints, and reasoning used to arrive at specific cost, effort, schedule, or resource projection.

For an IT project, the BOE should detail:

- The approach used to create the estimate (e.g., expert judgment, historical data, modeling)
- Key assumptions or dependencies that influence the numbers
- The scope and boundaries of what is included
- Any risks, uncertainties, or factors that could affect the estimate
- The level of confidence in the estimate

The purpose of the BOE is to make the estimate transparent, traceable, and justifiable, so stakeholders can understand how it was formed, its reasonableness in magnitude, and how reliable it is.

This field is editable and is limited to 4000 characters.

Annualized benefit totals should be expressed in dollars, even when selecting a Quantitative (Hard #) or a Quantitative (Soft #). That non-financial values are being estimated is recognized; however, there should be a conversion into dollar savings though the benefit is primarily of a numeric type. For example, a benefit may reduce error count by 50%, but that reduction should translate into a time reduction in applied oversight to make corrections. An hourly rate can be derived for a given job function and then used to calculate an estimated savings.

Each project is expected to estimate up to five years of benefit value. If estimates can only be projected for less than five years, calculate out as far as is reasonable given the established BOE.

Benefit Y1

The total monetary value the organization should realize within the first 12 months after the project goes live. It represents the initial financial impact of the project's delivery to ideally include measured gains such as cost savings, new revenue, reduced operational expenses, or efficiency improvements that can be converted into dollar values.

This field is editable and is limited to 999,999,999.

Benefit Y2

The total monetary value the organization should realize during months 13 – 24 after the project goes live. It represents the initial financial impact of the project's delivery to ideally include measured gains such as cost savings, new revenue, reduced operational expenses, or efficiency improvements that can be converted into dollar values.

This field is editable and is limited to 999,999,999.

Benefit Y3

The total monetary value the organization should realize during months 25 – 36 after the project goes live. It represents the initial financial impact of the project's delivery to ideally include measured gains such as cost savings, new revenue, reduced operational expenses, or efficiency improvements that can be converted into dollar values.

This field is editable and is limited to 999,999,999.

Benefit Y4

The total monetary value the organization should realize during months 37 – 48 after the project goes live. It represents the initial financial impact of the project's delivery to ideally include measured gains such as cost savings, new revenue, reduced operational expenses, or efficiency improvements that can be converted into dollar values.



NCDIT Enterprise Project Management Office
Phoenix Project Management System

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Title	Benefits
Revision	1.0
Effective Date	10/19/26

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Benefit Y5

The total monetary value the organization should realize during months 49 – 60 after the project goes live. It represents the initial financial impact of the project's delivery to ideally include measured gains such as cost savings, new revenue, reduced operational expenses, or efficiency improvements that can be converted into dollar values.

This field is editable and is limited to 999,999,999.

Benefit Total (Y1-Y5)

The sum of Benefit Y1 through Y5. This field is locked.

3.2 Benefit Categories

Benefit Categories

Qualitative Examples:

- Business – Adoption of best-practices, easier interpretation of data and outcomes, improved record keeping, transparency in process operations, improved job satisfaction, enhanced knowledge base, or alignment with mission, vision, goals, and objectives.
- Citizen Facing – Positive impacts to State citizens, businesses and other government agencies or entities, multi-language support, broader demographic considerations, reinforced service stability or breadth of offering, and improved customer satisfaction.
- In-Kind Service – One-stop service or resolution capability, transactional hand-off to an alternate State service without having to enter data anew, or receiving a transactional hand-off from another system.
- New Revenue – Increased financial understanding, improved decision-making and data usefulness, improved report readability, or heightened consistency and comparability.
- Technology & Operations – Harmonization of master data across multiple systems, alignment with industry standards, early intervention to informational or data-driven problems, increased self-service capabilities, or improved contract management.
- Other – Any additional qualitative benefit to the State not categorized above.

Quantitative Examples:

- Business – Cost savings in labor reduction due to efficiency, cost avoidance in increased labor if the project is not completed, calculated increased employee productivity, cost avoidance in lost funding to a program, savings due to elimination or consolidation of state services, etc.
- Citizen Facing – Positive impacts to State citizens, businesses and other government agencies or entities, such as increased wages, reduced unemployment, reduced risk to life or safety, consumer time savings to State resources such as registration, license, or permitting systems.
- In-Kind Service – Vendor contract credits, loaned hardware or software supporting the project.
- New Revenue – Modernized systems that increase the ability to collect taxes owed or those that collect fees or subsidies, be they direct or indirect, implementation of new fee-based services.
- Technology & Operations – Reduced cost for services or maintenance to supported operations, increased performance, reduced downtime, cost



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avoidance or risk mitigation to contract penalties or extended warranties, or replacement of legacy systems.

- Other - Any additional quantitative financial benefit to the State not categorized above.

Benefit Categories is editable.

3.3 Associated Goals

Associated Goals

If a benefit has a direct link to a stated Project Goal, identified in the Executive Summary, select that goal from the list. Multiple selections may be made.

The list selections are editable.

4.0 CONTACT EPMO

- EPMO@nc.gov
- [Feedback](#)
- [NCDIT EPMO Project Governance & Oversight](#)