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The temporal perspective of agile benefits management: an exploratory study

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ABSTRACT

Benefits management is deeply temporal, as it is concerned with measuring the past, aligning the present and planning for the future. In this paper, we explore the temporal perspective (which encompasses temporal focus and depth) of agile frameworks and agile benefits management. In order to do so, we analysed the two most widespread agile frameworks (Scrum and SAFe) and collected empirical data (nine interviews and one focus group with four participants). Our results describe how actions and artefacts are related to temporal perspectives in agile frameworks and in the practice of benefits management. Moreover, this paper illustrates how actions related to time need to be interrelated for the success of benefits management. As such, we contribute to shed light on two underdeveloped research areas, which are benefits management and temporality in projects.

Track: Project experiences

Keywords: Agile; Agile project management; Benefits management; Temporal perspective; Temporal work

The temporal perspective of agile benefits management: an exploratory study

1. Introduction

Despite the key role of time and temporality for strategy and strategic management, little is known about what people really do in relation to these two aspects (Bansal et al., 2022). Given that benefits management is the key link between strategy and projects (Musawir et al., 2017), we tackle this issue by delving into what people do in relation to time and temporality while managing project benefits. Not only is benefits management underdeveloped in the literature, but its relation to time has not been studied so far. This is rather surprising given the key temporal aspects related to benefits management, as will be presented in this work.

We adopt a broad conception of temporality, understood here as the construction of time, and we are interested in both how people negotiate connections between past-present-future, as well as between the near and distant future (short-long term). Calls have been made to understand project management in practice (e.g., Clegg et al., 2018; Martinsuo, 2013) and to explore how temporality unfolds in projects (Delisle, 2019). This inquiry is especially relevant for the topic of benefits management, as it is gaining increasing attention, while its definition and what people really do in practice remain unclear (Aubry et al., 2021). This is what we intend to do by exploring concretely what people do to manage benefits in relation to temporality.

If temporality is key to benefits management in general, given the importance of projecting benefits in the future, we contend that the agile context offers a playground especially appropriate to study these matters. Indeed, agile contexts come with many changes regarding temporal aspects such as the timescale, the duration and the rhythm, as the work is based on shorter iterations. As such, we chose to focus on agile benefits management, and more specifically on the two most widespread framework, that of Scrum (project level) and SAFe (organizational level) (Khoza & Marnewick, 2021).

Hence, this paper aims to combine these two crucial but understudied topics, benefits management and temporality, by exploring the temporal perspective of agile frameworks and agile benefits management. Temporal perspective, in this paper, refers to temporal focus (past-present-future) and temporal depth (short-long term). Before delving into agile benefits management, we start by analysing temporal perspectives of the two main agile frameworks used in practice (Scrum and SAFe); also the ones being used in the organization studied in this paper. We complement the analysis of the framework with an empirical investigation of agile benefits management in an organization using Scrum and SAFe to manage its projects. Two research questions guide our inquiry:

RQ1: What is the temporal perspective underlying agile frameworks?

RQ2: How do people accomplish agile benefits realization regarding temporal perspective?

The paper is structured as follows. We review the literature on time for projects and strategy, as well as on agile methods and benefits management. Then, we present our research strategy by describing our data collection and analysis methods. Our preliminary results are then presented in two sections: one detailing temporal perspective in agile frameworks, and the second in agile benefits management in practice. Finally, we discuss our results by highlighting our theoretical and practical contributions.

2. Theoretical framing

2.1. Time for projects and strategy

If time is crucial in organizations in general, it is of special importance for strategy and projects. The importance of time for strategy is clear given the importance of the future for its realization. Strategy is also about timing given the importance of speedy strategic decisions on

firm performance (Baum & Wally, 2003). Finally, time is also at the core of strategic change, although this literature mainly focuses on clock or calendar time (Kunisch et al., 2017).

Time and temporality have been identified as topics especially relevant for project studies. Time is a defining characteristic of projects given their limited duration (Burke & Morley, 2016; Lundin & Söderholm, 1995). At a broader level, the relevance of temporal phenomena such as entrainment and temporal (mis)fits have been highlighted (Dille & Söderlund, 2011; Pérez-Nordtvedt et al., 2008). Permanent and temporary organizations are frequently put into opposition, however, the relevance to connect them has been recognized (e.g., Riis et al., 2019).

Time is a broad and multidimensional concept. Its dimensions include tempo, timing, focus/perspective (past-present-future) and rhythm (duration, sequence, transitions, etc.), among others (Adam, 2000). Based on an extensive review of time in strategic change (Kunisch et al., 2017), three perceptual dimensions have been identified as particularly relevant to this topic: urgency, temporal focus, and temporal depth. First, urgency can be a characteristic of events or a characteristic of individuals concerned with the passage of time and feeling generally hurried across situations (Shipp & Cole, 2015). Second, temporal focus refers to the extent to which individuals, groups, and organizations direct their attention to the past, present, and/or future (Kunisch et al., 2017). As such, temporal focus is concerned about the direction(s) of temporal attention (Kunisch et al., 2017). Finally, temporal depth is defined as “the temporal distances into the past and future that individuals and collectivities typically consider when contemplating events that have happened, may have happened, or may happen” (Bluedorn & Waller, 2006, p. 366). While temporal focus is related to the horizon, temporal depth is concerned about the length of the horizon (Kunisch et al., 2017). Temporal depth is considered as a dimension that varies greatly between individuals and even whole societies (Bluedorn & Ferris, 2004). Short, medium and long term can be considered as a way to measure temporal

depth. We used the terms temporal perspective in this paper since we are interested in both temporal focus and depth.

As we can see, time and temporality, and their relevant dimensions for strategy and projects are manifold. In the next sections, we will delve more specifically on agile methods and benefits management.

2.2. Agile methods and benefits management

Agile methods are iterative forms of delivering artefacts (mostly IT and/or digital deliverables) allowing adapting the delivery of strategy by implementing continuous customer feedback and lessons learned from previous iterations before completion of the final project. Formulated as an alternative to traditional methods (i.e., Waterfall) and based on the agile principles, agile projects are performed by a small collaborative work team, generally smaller than 15 people (Kruchten, 2013) or even smaller (e.g. maximum 9 people in the Scrum framework). Teams can respond quickly to change because they develop artefacts incrementally, in short time-boxed development cycles or “sprints,” and they focus on developing the highest priority features in one to six-week delivery increments (Hobbs & Petit, 2017).

Organizations begin to transfer agile principles and approaches to large level for distributed teams, large projects, and critical systems (Hobbs & Petit, 2017). The reason for scaling agile is to reap the benefits of an agile methods at the organizational level. These benefits can be summarized as team morale improvements, increased reports of project predictability and a reduction in project risk (VersionOne Inc., 2019). Various scaling agile frameworks do exist.

Projects bring change and when this change is perceived by the users as a positive experience, then it is a benefit. When it is perceived as a negative experience, then it is a

disbenefit. The process of identifying benefits in the business case up to the harvesting of the benefits at the end of the project is referred to as benefits realisation management (BRM). Various authors provided their own BRM processes (Ashurst, 2011; Bradley, 2016; Project Management Institute, 2019; Ward & Daniel, 2012), but at the end of the day, the major processes in BRM are the (i) identification of benefits, (ii) the planning of benefits realisation, (iii) the execution of the benefits realisation plan and (iv) the sustainment of benefits. These BRM processes follow a more traditional waterfall project management approach and are thus not necessarily appropriate for an agile environment where an iterative approach is followed.

Marnewick and Marnewick (2022) identified an agile benefits realisation management process. This process spans across three levels. The portfolio level is where the organisational strategy is translated into value streams. The second level is where the planning and prioritisation of benefits are taking place. The second level, Planning and Prioritisation, focuses on the benefits and how they are identified, planned, transitioned and sustained. The performance of the past in terms of benefits realisation influences the current decision on what changes should be made in relation to the projects and their associated benefits. This is done with an eye on the future to realise the maximum benefits to achieve the strategy. The re-evaluation and reprioritisation of projects and their associated benefits is a frequent activity and is normally done at a Program Increment (PI). The third level, Implementation, is where normal agile activities take place. This is the level where typically Scrum processes are used to manage the creation of an artefact. The past performance in relation to the creation of the artefact influences present decisions on how to organise future work. These decisions are based on creating an artefact that adheres to the product owner's requirements and does not necessarily focus on benefits realisation. The decisions are short-term (past, present and future) and not long-term.

3. Methods

Our method includes two axes: 1) a text analysis and 2) an empirical investigation.

A text analysis was first executed to get data for our first research question (what is the temporal perspective underlying agile frameworks?) We focused mainly on documentation related to the two agile framework most used in practice: Scrum method (Hron & Obwegeser, 2022) to identify ceremonies and artefacts for managing agile teams, and Scaling Agile Framework (SAFe) (Digital.ai, 2021) to cover ceremonies and artifacts for adopting agile principles at the organisational level (programme, portfolio and operations). One author aimed to understand how ceremonies and artifacts are executed, determine their frequency and define which information is used and/or discussed (temporal focus and depth). The analysis results were validated by the two other authors during two iterations.

Then, to answer our second research question (how people accomplish agile benefits realization regarding temporal perspective?), two sets of data have been analysed. The first phase involved individual interviewees with people whose organisations scaled agile. This was done in South Africa. The second phase was a focus group involving four participants. These participants are involved in agile projects and their organisations are in the process of scaling agile. A decision was made to start with interviews to gather information around agile benefits realisation due the topic's exploratory nature (Yin, 2018). The focus group allowed participants from different organizations to discuss BRM processes and compare with what has been identified in the first phase. They came from two large financial organizations (3), and one was a consultant with a large experience in various organizations currently working in a para-public organization.

The interview guide of phase one consisted of four sections but only one section that focused on value and benefits realisation within a scaled agile environment is applicable for this article. The focus of this section was to determine whether an agile benefits realisation

process exists or not and what the associated challenges are. The interviews were conducted virtually by two researchers via Microsoft Teams and recorded for analysis purposes. As shown in Table 1, nine interviews were conducted ranging between 33 minutes and 1½ hours.

Table 1. *Summary of interviewees*

<i>Type</i>	<i>Role</i>	<i>Identifier</i>	<i>Agile framework implemented</i>	<i>Agile experience (years)</i>	<i>Duration</i>
Financial institution (1)	Head of PMO	PMO-1	SAFe	11	00:53:30
	Head of Transformation	TRAN-1	SAFe	8	00:45:38
Consulting	Partner	PART-1	SAFe	11	01:23:49
Financial institution (2)	Business IT executive	IT-1	SAFe	10	00:57:45
Entertainment company	Change manager	CHANGE-1	SAFe	2	01:03:29
	Business transformation	TRAN-2		2	
	Consultant	CONS-1		10	
Financial institution (3)	Chief value officer	CVO-1	SAFe	7	00:39:18
IT outsourcing	Agile coach	COACH-1	SAFe	10	0033:06

The focus group involved four Canadian participants and took 1½ hours. This session was chaired by one of the South African researchers to ensure consistency. The focus was also on how benefits are realised in an agile environment.

The transcriptions went through an iterative process of open coding which summarised the data into smaller meaningful units called codes and themes (Saldaña, 2021; Williams & Moser, 2019). ATLAS.ti was used to facilitate the coding process. During the first round, eighty-five quotations were coded across four themes (benefit identification, benefit planning, benefits tracking and benefit harvesting) that resembles the agile benefit realisation process. During the second round of coding, three themes (past, present and future) were identified as per the research topic.

4. Results

4.1. Agile frameworks and temporal perspective

The results section starts with the analyse of temporal perspective of the two main agile frameworks based on the text analysis: that of Scrum, and then SAFe. It aims to answer our first research question: What is the temporal perspective underlying agile frameworks?

Scrum

Scrum is based on high levels of cooperation between team members while focusing on delivering the highest priority business value. To enable cooperation and focus on value, Scrum teams employ specific agile artefacts and ceremonies (Tam et al., 2020). In this research, we propose that these elements provide opportunities to define, analyze, plan, and assess benefit (project value) based on a specific time rhythm (short iterations of work lasting between one and four weeks) and relying on different temporal focus (past, present, and future). As shown in the Table 2, Scrum employs four different ceremonies to ensure proper execution:

- **Daily scrum** is a 15-minute daily team meeting to discuss the completed and planned work, and any roadblocks. It focuses on the present (what is hindering the flow?) and the future (what tasks are in the pipeline today?) Discussions are based on a short-term scale of time (daily basis).
- **Sprint planning** is a team meeting to decide the work for the next iteration. It focuses on identifying and planning the future value to deliver for the next iteration. Discussions are based on a medium-term scale of time determined by the iteration period (1 to 4 weeks).
- **Sprint review** aims to demonstrate the work completed during the iteration to the customer. It focuses on the present since the customer provides feedback depending on the current value deliver by the team. Discussions are based on a medium-term scale of time determined by the iteration period (1 to 4 weeks).
- **Sprint retrospective** provides the opportunity to review the teamwork during the iteration. It focuses on the past by identifying what they did well and what did not go

as planned, and in the future by determining action plans to overcome the obstacles for the next iteration. Discussions are based on a medium-term scale of time determined by the iteration period (1 to 4 weeks).

Scrum also employs artefacts to ensure information transparency; thus everyone has the same understanding of what is the project value. Within the agile environment, the concept of value is perceived as the same as benefits or benefits realization (Marnewick & Marnewick, 2022).

- **Product artefacts**, such as the product backlog, the product roadmap or the product vision, determines the value to deliver throughout the whole project. It focuses on the future considering benefits, features, and user stories to deliver throughout the entire project cycle (long-term).
- **Sprint artefacts**, such as the sprint backlog or the sprint vision, consists of a subset of the product backlog items that were selected and prioritized by the team. It focuses on the future by identifying benefits, features and user stories to deliver at the end of the iteration (medium-term).
- **Product increment** is a product backlog item that has been completed. It focuses on the present by evaluating the value created during each iteration (medium-term) and throughout the entire project (long-term).
- **Team measures**, such as burn down charts or velocity, are artefacts used to evaluate the team performance. It focused on the past by assessing the value created or delivered during each iteration and throughout the entire project (long-term).

Table 2. Analysis of temporal perspective in Scrum method

	Temporal perspective		
	Past	Present	Future
Scrum (team level)			
Scrum ceremonies	Retrospectives (medium-term)	Sprint review (medium-term)	Sprint planning (medium-term)

		Scrum meeting (short-term)	Retrospectives (medium-term) Scrum meeting (short-term)
Scrum artefacts	Team measures (medium-term and long-term)	Product increment (medium-term and long-term)	Product backlog, roadmap or vision (long-term) Sprint backlog or vision (medium-term)

Scaling Agile Framework (SAFe)

SAFe enables agile values and principles in business organization while considering some rigidity to coordinate several agile teams. SAFe focuses on implementing agility through the entire organization, and not only on development teams. Therefore, it includes three specific levels: team, program, and portfolio. In a simple way, at the team level, SAFe defines how each team that participates in the development of solutions is articulated. At this level, Scrum or Kanban techniques are proposed (refer to the team-level section). At the program level, the organization and the objectives pursued are outlined for enabling teams' coordination and collaboration. In this case, SAFe includes ceremonies and artefacts to define what work will be carried out by each team based on a chain of command and results, known as agile release train (ART). At this level, each team is involved in PI to plan and coordinate activities and iterations for all the teams belonging to the same agile release train (or program). PIs are typically ten weeks long where four development Iterations (sprints) are followed by one Innovation and Planning (IP) Iteration of two weeks. Finally, the portfolio level defines and promote what contributes to creating value in the organization by enabling a systematic and economic view of the organization. As shown in the table 3, SAFe ceremonies and artefacts could also be related to determining, analyzing, planning, and assessing benefits (project value) within a time rhythm (sprints and PIs) and based on the temporal focus (past, present, and future).

Table 3. Analysis of temporal perspective in Scaling Agile Framework

	Temporal perspective		
	Past	Present	Future
SAFe (organizational and program level)			
SAFe ceremonies	Scrums of Scrums (short-term) PO synchronisation (short-term) Inspect and adapt (medium term)	Scrums of Scrums (short-term) PO synchronisation (short-term) System demo (short term) PI system demo (medium-term)	PI Planning (medium-term) Scrums of Scrums (short-term) PO synchronisation (short-term) Inspect and adapt (medium term)
SAFe artefacts	PI objectives (medium-term)		Program increment (long-term) PI objectives (medium-term)
Organizational level—portfolio level			
SAFe ceremonies	Strategic portfolio review (medium-term) Portfolio review (short-term)	Portfolio review (short-term)	Strategic portfolio review (medium-term) Portfolio review (short-term) Participatory budget (long-term)
SAFe artefacts	Portfolio artefacts (long-term)		Strategic theme (long-term) Value streams (long-term) Portfolio artefacts (long-term)
Continuous delivery pipeline	Continuous exploration, continuous Integration and continuous deployment		

SAFe considers six different ceremonies to ensure program coordination:

- **PI planning** aims to define and plan what teams should deliver and how they are going to coordinate their work during a PI (medium-term). Teams focus on the future by defining PI objectives that determine what is the value to deliver.
- **Scrum of scrums** is a meeting with representatives of each team (usually the scrum master) that aims to coordinate dependencies between teams and communicate teams' progress and impediments. It focuses on the present (is there any blocking issue? Are

you about to put a block in someone else's way) and on the future (what will your team accomplish between now and the next meeting?). Discussions are based on a short-term scale of time (bi-weekly basis during the PI).

- **PO synchronization** is a similar meeting as the scrum of scrum where product owners communicate how teams are accomplishing PI objectives and review the Program backlog to deliver value for the following PI. It focused on the past (which PI objectives have been accomplished?), on the present (is any updated necessary to fit with the current environment?) and on the future (which features, and benefits should be considered for the following PI?) Discussions are based on a short-term scale of time (weekly basis during the PI), but also on a medium-term scale for defining future features to be considered in the following PI planning.
- **System demo** aims to get customers' feedback about the system and ensure work integration for all the teams. It focuses on the present since customers provide feedback depending on the current value delivered by all the team. Discussions are based on a short-term scale of time determined by the sprint cycle.
- Similar than the system demo, **PI system demo** aims to get customers' feedback about the system that has been delivered during the PI. It focuses on the present since customers provide feedback depending of the current value delivered. Discussions are based on a medium-term scale of time determined by the PI cycle.
- **Inspect and adapt** enables teams in a program to reflect about work realized during the PI. It focuses on the past by identifying what they did well and what didn't go as planned, and in the future by determining action for the next PI. Discussions are based on a medium-term scale of time determined by the PI cycle.

SAFe proposes the following artefacts for program coordination:

- **Program artefacts**, such as the program backlog and program roadmap, determines which features and enablers are considered in the system to deliver value to customers. It focuses on the future considering benefits to deliver throughout the entire project cycle (long-term).
- **PI objectives** determine what teams are going to deliver at the end of the PI. It focuses on the future by defining and estimating business value to deliver at each PI (medium-term), but as well, it focused on the past by giving a framework to assess program performance throughout PI (medium-term p).

SAFe proposes ceremonies and artefacts to ensure portfolio alignment to business strategy, value maximization, portfolio balance and portfolio performance (Petit et al., 2023). It considers the following ceremonies:

- **Strategic portfolio review** is a meeting aiming to inspect strategic themes and their progress. It focused on the past by assessing portfolio performance, but it also considers the future since portfolio managers can review and modify, if necessary, the portfolio vision and its related benefits. This ceremony has a medium-term scale of time since it takes place approximately every 3 months, usually in the middle of a PI.
- **Portfolio synchronization** aims to review portfolio hypotheses to decide whether to cancel, pivot or persevere value streams. It focuses on the present by reviewing hypothesis in function on the current environment, but also on the future if value streams are updated. This ceremony has a short-term scale of time since it takes every month.
- **Participatory budget** aims to allocate the budget to the different value streams. It focuses on the future by estimating the necessary investments to deliver value. This ceremony has a long-term scale of time since it takes place every 6 months.

SAFe proposes the following artefacts to ensure value maximization:

- **Strategic theme** represents a specific and differentiated business intent and communicate aspects of the organization's strategic objective to the portfolio level. It focuses on the future by determining benefits to deliver throughout the entire project cycle (long-term).
- **Value stream** is a set of interdependent actions that teams should execute to add value for its customers from their initial request through the value delivery to customers. It focuses on the future by determining action to deliver benefits throughout the entire project cycle (long-term).
- **Portfolio artefacts**, such as the portfolio backlog and portfolio roadmap, determine and visualize how teams achieve benefits throughout the entire project cycle (long-term). Thus, it focused on the future; but they can also be used to assess portfolio performance.

In a SAFe environment, organisations can enable the continuous delivery and deployment of deliverables in small releases by implementing a continuous delivery pipeline. This pipeline considers four main elements: **continuous exploration** aims to identify what needs to be built to create value, **continuous integration** aims to prioritize product backlog features for each PI, **continuous deployment** aims to integrate developed features in the operation environment, and **release on demand** aims to deliver value to the stakeholders. These elements are not linearly executed and don't have a single temporal perspective. They should be considered as a cycle with several iterations that are executed according to the organisation and stakeholders' context and needs.

4.2. Benefits management and the articulation of the past, present and future

The second part of the results addresses the second research question: How people accomplish agile benefits realization regarding temporal perspective? Based on interviews and the focus group, it will present elements from our empirical investigation as they are related to the past, present and future.

4.2.1. The past

Participants evoked the past through reviews, retrospectives (done either at the project or organizational level) and data on past projects. Regarding this last point, an issue has been mentioned related to the limited amount of data on past projects. Despite holding retrospectives, benefits are seldomly measured on past projects. The focus is rather on the present (actual projects) or the future. The lack of attention toward the past is clear in the following quote:

They don't look back to the past. They do, they did their postmortem, they did their retro action, and they have everything that they want to have, and they go to the next thing. So yes, for the, the long-term, looking at the benefits, well, for us it's not in the, the scrum or the DevOps team that they're gonna do it. [Group Discussion]

Past focus—Retrospectives

The retrospectives are used by organisations to determine whether the product is still going to achieve the intended benefits. The focus is rectifying the past with a view on the future.

You see, I've put it first 'cause that's the one where when we actually go and do a retrospective, and that's maybe where what we can touch on so we do quite a number of these retrospectives where we look at what went wrong. Afterwards, in terms of the benefits were not realized and there were all sorts of issues with the software, delivery hasn't happened. Now you go and you look at what went wrong. The what goes wrong often goes with strategic alignment." [PART-1].

The retrospectives are also used for alignment purposes as stated by IT-1: “So there’s retrospectives. You kind of have the different levers to pull it, so to say if they represented on after production support, then next increments. Let’s figure out how do we make slightly more, or let’s make sure we get a chunk of that capacity available to invest.” However, as we can

see, the past is closely related to the future, as this participant projected himself into the future based on what has been assessed during the retrospective.

Past focus—Reviews

Reviews are an important aspect of agile as stated in the principles. These reviews are also incorporated into scaled agile. *“We actually sit every month with our retail executive and he’s managing his eggs where we review the programming increment execution.”* [IT-1]. In order for reviews to be meaningful, COACH-1 made the following statement: *“So the metrics and the process of setting that up is done from the onset.”* For reviews to be successful, it must be done frequently to address issues of the past but it must also be reviewed against predefined metrics.

4.2.2. The present

The present is evoked through the act of aligning all the visions and product roadmap, in an ongoing effort, and the idea of going into the same direction. Monitoring and reporting on the progress of initiatives is also done with a focus on the present. Participants mentioned data on what is happening on ongoing projects, which seem to be more readily available and actionable than data on past projects.

The Present—Alignment

Although alignment is focused on the present, alignment is done based on actions in the past and with an eye on the future. To illustrate this, CVO-1 mentioned that *“I think we sensed we were spending an enormous amount of money on change the bank with very little tangible work to show for it and what we’ve now done is focused more on the alignment of our change, the bank works to the achievement of the outcomes aligned to our true north metrics.”* Alignment is a challenge. *“Because today I think one of the most complicated things is that our roadmaps are not always aligned between all departments or, so it’s a bit hard to say, we are*

working on this, and you will be using our product there and, you will deliver this here.” [Group Discussion]. This challenge might have a negative impact on the future if the alignment is not achieved between the different projects within the organisation.

The Present—Direction

A need exists to ensure that everyone is pulling in the right direction. As with alignment, direction is based on the past. *“I think to me it’s about aligning all the visions and roadmaps and going into the same direction.”* [Group Discussion]. To facilitate direction, team members need to be close to each other and regularly communicate. *“At some point we managed to co-locate, you know, business product owners with teams and they could then like right there every day see what the teams are doing and get feedback, give direction to that you know. So I think that created a lot more visibility of how we’re actually progressing.”* [IT-1].

The Present—Monitoring

The purpose of monitoring is to understand the current situation around all the projects and whether they will achieve the intended benefits. *“Uh, so, so those are definitely being monitored. When we say benefits realisation, so ideally what you’d like to see and to come to your question, then you know every project, every initiative that we run.”* [PMO1].

4.2.3. The future

Finally, the future is evoked through the act of planning and the artefacts of vision and roadmap of all projects. The future is also evoked through the presence of short, medium and long-term benefits. As in the next extract, short-term benefits are related to the initial delivery (minimum viable product), and long-term benefits to the final product.

That minimum viable product are you already harvesting some benefits from that MVP or, someone else and you mentioned that person earlier mentioned that the MVPs are only staggering and only afterwards you start getting the benefits and you only get benefits that like maybe 30% up front and only the long-term benefits

so that they say is almost immediate benefit short-term benefits based on the MVP and then long-term benefits if the whole product is released. [IT-1]

The Future—Planning of benefits

The focus of planning is very much in the future. But since the future is unpredictable, planning is also subject to change. *“So what we find in our model is what you’ll find in our three-year planning you’ve got now benefits and things are linked to it and people have baked into the business case. But when you respond to change within agile environment, things move.”* [IT-1]. The importance of planning is to link the anticipated future benefits to the strategy and vice versa. *“Because in the PI planning, you start to link all those objectives maybe to strategy and benefits.”* [TRAN-1]. In conclusion, *“the whole benefits process is about identifying the benefits, planning prioritization around it, um, and then the delivery of it, and then the long-term sustainment of those benefits.”* [Group Discussion].

The Future—Roadmap

In a scaled agile environment, the roadmap is scheduled for deliverables looking at a planned horizon. It creates the linkage between the vision and operations. *“So, this group of people, they are owning the vision of what we are doing and the long-term, like three years roadmap, of all our product.”* [Group Discussion].

The Future—Vision

The vision or strategies are future focused. IT-1 mentioned that they are *“really making sure that we actually harvest benefits out of that is the other side, and I think in terms of the purpose of the organization and where we want to go and driving our strategy was important for us to make sure we can only kind of sign up for the right kind of initiatives.”* This is supported by CHANGE-1 with the focus of the product alignment to deliver on the strategy. *“So it would be, you know, I want to certain products, but it would be going further to say OK, how does that actually deliver on my objectives for the business unit, right? So that’s where*

that link to strategy comes up and then the levers and actions would be what we would do to actually deliver that right?” [CHANGE-1].

4.3. The interrelationship nature of temporal perspective for benefits management

Although the concepts presented may be related to different temporal focus, either one of the past, present or future, what emerged from the data is the interrelated nature, as participants frequently reference many temporal elements at the same time. For example, present and future goes hand in hand: *“I think to me it’s about aligning all the visions and roadmaps and going into the same direction.”* [Group Discussion].

In the following example, strategic alignment is closely related to retrospective (past) and checking if the benefits have been realized:

For me the organizational fit and the strategic alignment. You see, I’ve put it first ’cause that’s the one where when we actually go and do a retrospective, and that’s maybe where what we can touch on so we do quite a number of these retrospectives where we look at what went wrong. Afterwards, in terms of the benefits were not realized and there were all sorts of issues with the software, delivery hasn’t happened. Now you go and you look at what went wrong. The “what” goes wrong often goes with strategic alignment. And then if you take that and you say, well me realizing my benefits in the end, so strategic alignment must be the first thing I want to do. [PART-1]

Some issues related to benefit management has to do with planning:

So if you then look at business benefits, and I mean you must reliably be able to predict the costs involved or the cash flows. Plus then the outcome. And when you build for yourself, it’s probably more difficult to predict those, but in saying that when you go into a process where you acquire, the blind spot is often that you need to change the organization to fit what you buy. Your culture can’t stay the same, so it’s there’s a lot of these trade-offs that are qualitative in nature that is not assessed with benefit realized. [PART-1]

Past, present and future actions can be done altogether with success: assessing the present, reviewing the past and projecting the future, in a recurrent manner. This relationship, for instance, is observed during retrospectives or Inpect and Adapt ceremonies. This represents the temporal work of benefits management. Temporal work may happen at a smaller scale

(team/project) or larger scale (benefits management/organization). But one thing is sure: past, present and future actions need to be harmonized to allow benefits management to flow.

4.4. Benefits management and temporal challenges

Three key challenges related to time and benefits have been uncovered. The first one is the limited data available on past projects and benefits. People seem to be prone to move forward, however, benefits on past projects are not always well measured and follow-up.

The second challenge has to do with long-term alignment and long-term benefits realization. In some cases, agile seems to bring a slight focus on the present and the neglect of the long-term. “What about those long-term benefits? Two years, three years from now? Do you actually care about it or not? Do you hope that it will happen eventually?” The lack of continuity regarding the people in charge of benefits has been mentioned as an element contributing to this issue.

Finally, a third and more global challenge is the lack of harmonization between the past, present and future, as evoked in this quote: “*I would say the biggest challenge is a lack of harmonized process*” [Group Discussion].

5. Discussion

Temporal focus (the degree to which individuals attend to the past, present, and future) has been identified as a critical predictor for strategic outcomes (Back et al., 2020). Temporal focus influences how people “incorporate perceptions about past experiences, current situations, and future expectations into their attitudes, cognitions, and behavior” (Shipp et al., 2009, p. 1). Temporal focus is often studied in isolation and very few research has examined how they are related (Kaplan & Orlikowski, 2013; Slawinski & Bansal, 2017).

Temporal work is closely related to the relationship between past, present and future (what represents temporal focus). Temporal work can be defined as “any individual, collective,

or organizational effort to influence, sustain or redirect the temporal assumptions and patterns that shape strategic action” (Bansal et al., 2022, p. 7). Kaplan and Orlikowski (2013) have proposed the concept of temporal work in strategy making to depict how actors resolve differences and link their interpretations of the past, present, and future in order to construct a strategic account enabling concrete strategic choice and action.

Benefits management is about aligning the vision of the past, present and future, and as such, we argue that it represents an illustrative example of temporal work. In this paper, we explore which facets of benefits management are related to the past, present, future, as well as temporal depth (short, medium and long term). We highlight that actions linking past, present and future are key for benefits management, and underline lack of harmonization as a key issue, along with the neglect of the long-term and the limited data available on past projects and benefits. However, our data reveals that temporal depth (short, medium or long-term) generates anomalies to monitor benefits, especially when teams project the future focus on the long-term.

Temporary organizations have been characterized as evolving in a bubble “decoupled from other past, contemporary, or even future sequence of activities” (Lundin & Söderholm, 1995, p. 446). By illustrating temporal work, we uncover other dimensions of time than the objective one that dominates project management rationale (Delisle, 2019). We also go beyond seeing permanent and temporary organizations as simply in opposition, as we propose that benefits management is an area connecting both temporary and permanent organizations, as it allows the connection between the projects and what they bring out to the organization. Our work sheds light on an area where the projects are not conceptualized as this limited, that of benefits management. Indeed, benefits management builds on what came before and focuses on what will remain from projects. Furthermore, as agile works by iterations, it allows us to depart from a linear view of the project. As such, this topic contributes to enlarging our view of the projects, and more specifically, how we understand these from a temporal point of view.

Given the nature of benefits management and the necessary articulation of the past, present and future, we propose that the concept of temporal leadership as a key capability for agile benefits management. Ancona et al. (2001) have coined the term temporal leadership as a way for senior teams to operate simultaneously in the present and the future.

Teams enact temporal leadership as they entrain their organizations to technology and competitive cycles, manage across multiple time frames, and create temporal architectures for their organizations. (p. 656)

It has been applied to the team level to address “how team leaders facilitate the clear temporal structure of team activities through scheduling, synchronizing, and allocating temporal resources that are not specified in extant task-oriented leadership behaviors” (Mohammed & Nadkarni, 2011, p. 402). In agile environment, teams can employ temporal leadership to manage how they are creating value throughout project iterations. As the responsible for benefits management is often blurry, one area of research could lie into shared temporal leadership.

6. Conclusions

Benefits management continues to gain more and more interest, both in practice and in academic literature, while we know little about its actual practice (Aubry et al., 2021). This study aims to contribute to “opening the black box of benefits management in the context of projects” (Aubry et al., 2021, p. 434). It does so by uncovering an important dimension for project studies, which is temporality, through investigating 1) the temporal perspective underlying agile frameworks and 2) how people accomplish agile benefits realization regarding temporal perspective.

The paper makes two key contributions. First, it shows how benefits management is about aligning the vision of the past, present and future, and as such, how it represents an illustrative example of temporal work. Second, it illustrates how benefits management is an

area connecting both temporary and permanent organizations, contributing to a vision of projects that are not finite and decoupled from their organizations.

This study took place in an agile context, and it would be relevant to compare both traditional and agile contexts. For example, an avenue to explore is if the focus on the present that we uncovered has to do with the agile context and its fast pace. Also, the importance of temporal perspective in benefits management emerged from the data, but it would be relevant to explore further this area topic with a research design specific to this inquiry.

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