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When frameworks empower their agents: The effect of organizational project management frameworks on the performance of project managers and benefits managers in delivering transformation projects successfully

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A B S T R A C T

This research examines the role of institutional frameworks in the successful delivery of transformation projects. Based on a survey of 130 firms that adopted ERP, this research found that transformation projects were delivered more successfully when organizations institutionalized their project management and benefits management framework at a higher level, because these frameworks enhanced the power of the role of project manager (PM) and benefits manager (BM) (i.e., business change managers and benefits auditors). Although organizations are investing more in practicing project management frameworks to strengthen the role of PMs more than that of BMs, benefits management frameworks and their missioned power to their agents are significantly more important than project management frameworks with their originating power. The benefits management framework affects the success of digital transformation because the power of the BM's role partially mediates them. Project management frameworks affect success, but the power of PMs does not mediate this relationship. The main implication of this research is that giving the offices of project management and transformation management prominent roles could help organizations improve their readiness for transformation projects.

1. Introduction

68% of the organizations studied by the Project Management Institute indicated that they were involved in digital transformation projects in 2020. 35% of the transformation projects failed and about one quarter of the projects did not meet the intended goals (PMI, 2021). Digital transformation projects, to be successful, must ensure a good fit between an organization's technical systems (i.e., the island of technology), on the one hand, and social systems (e.g., organizational levels and system users) on the other (Grant, Hwang & Tu, 2013). This can be referred to as a socio-technical system. The technical system, sometimes called the "technical resources" (Nwankpa, 2015), involves the configuration and/or customization of a system, the system quality, and the service quality of an IT department (Ifinedo et al., 2010). The social system relates to changing business practices, values, and routines to realize different benefits from the transformation initiatives (Badewi et al., 2018). Successful digital transformation is based not only on the successful delivery of the technological artifacts on time and within budget (Nwankpa, 2015), but also on aspects of personnel (attitude, perceptions, and ownership of benefits) and organizational aspects (organizational culture, values, norms, and beliefs). Thus, an agent is needed to lead this organizational and personnel change. The task of this agent is to plan and implement the recombination of an organization's values, norms, business practices, decision-making processes, and power structure (Shao, Feng & Liu, 2012). For instance, previous research has found that digital transformation systems need to be adjusted and

changed to fit users' needs, and that a positive attitude to the change is needed in a business when such change is implemented (Kwahk & Ahn, 2010). Thus the process requires an agent to lead the change and also to ensure accountability and due ownership of benefits.

The success of a digital transformation project can, therefore, be defined not only as the successful deployment of technological artefacts on time and within budget but also including the gaining of the benefits expected from them (see for example Dezdar & Ainin, 2011; Koh, Gunasekaran & Rajkumar, 2008; Ram, Wu & Tagg, 2014). To conclude, the delivery of the benefits is not expected to be realized without active intervention from the owners of the benefits (i.e., those whose behaviors should be altered to recoup the benefits aimed at) but with the help of the business change agents (Badewi, Shehab & Peppard, 2015; Zwikael & Meredith, 2018). This process is governed through benefits realization management (Ashurst, Doherty & Peppard, 2008; Doherty, 2014). Benefits realization management is the process of actively involving stakeholders in identifying, planning, measuring, and tracking benefits from the conception of the initiative to a state where the benefits sustain themselves (Badewi, 2016).

Since digital transformation projects require personal, organizational and technical work, it is proposed that two separate agents should deliver implementation: a project manager to lead the technical work, and a benefits manager (i.e. a Business Change Manager and Benefits Auditor) to govern the personal and organizational aspects (Badewi, 2016; Badewi & Shehab, 2016). Project management is dominated by technical, deterministic and engineering approaches. In contrast,

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benefits management is dominated by heuristic and soft reasonings (e.g., those concerning perceptions, behavior, attitudes, and values) (Badewi & Shehab, 2016). Badewi and Shehab (2016) found that combining technical and soft frameworks into a single framework could significantly improve the success of digital transformation projects.

A framework is defined as a combination of interlinked practices that support a particular approach to achieving a specific objective (Budler & Trkman, 2019). A framework is defined in the present research as the agent's perspective in interpreting the surroundings in general and towards performing activities in particular, which is reflected in the methodologies, practices and tools that are adopted. According to neo-institutional theory, the framework is the main determinant of the individual's and the organization's behaviors (Greenwood & Hinings, 1996). Thus, directing the framework of the agents by any means will in turn influence individuals' perceptions, attitudes, interpretations of the changes in their environment and hence their behavior and performance. The framework on an organizational level plays an important role in empowering its owners (Clegg & Courpasson, 2004); accordingly, it can be argued that the greater the institutionalization of a transformation framework in the firm, the greater the empowerment of the project and benefits managers.

This research extends the work of Zwikael, Meredith and Smyrk (2019) by examining the effects of different roles (i.e. those of the project manager and benefits manager) involved in the transformation projects on the project's success. This work also extends the research by Badewi and Shehab (2016) in arguing that the institutionalization of the project and benefits management frameworks will in "normal" projects improve the power of the project and benefits managers (in terms of having full-time appointments on the transformation projects) to increase the success of the transformation projects. This proposition is extrapolated from the adoption of neo-institutional theory in examining the power of frameworks in organizations and empowering its agents (Suddaby, Seidl & Lê, 2013). Neo-institutional theory provides a novel theoretical perspective from which to describe the work of enforcing project and benefits management frameworks in "normal" projects in the empowerment of their agents in radical transformation projects. Thus, the research question is, "What is the effect of institutionalizing project and benefits management frameworks in an organization on the power of the agents and their possible role in improving project success?"

The significance of this research is two-fold. First, it sets the theoretical foundation for understanding the role of institutionalizing project and benefits management frameworks in an organization on the success of a transformation project. This academic contribution will advance our understanding of the importance of having agents to institutionalize and enforce the existence of these frameworks in day to day business and not only in times of transformation. This research argues that the existence of permanent agents (e.g. a transformation management office or business excellence office) will leverage the success of transformation projects because it will empower the transformation agents (i.e. the project and benefits managers). Second, this research theorizes the relationship between the existence of full empowered transformation roles and the success of a firm's initiatives. Currently, organizations may appoint project and benefits managers on a part-time basis to reduce costs and share resources; however, this research argues that, empowered by the existence of transformation frameworks, the organization will value these roles and empower their holders to deliver successful transformation.

2. Literature review

2.1. Organizational frameworks

Frameworks dominate minds, and so behaviors, with or without the awareness of those affected (Durand & Thornton, 2018). These frameworks guide the behavior of actors within a field and render their actions

"comprehensible and predictable" (Lounsbury, 2002: 255). Specifically, frameworks provide rules for action that help actors cope with ambiguity and cognitive limitations by highlighting particular issues and problems; determining which are salient, requiring managerial attention; and framing possible solutions. In other words, institutional framework link "internal mental cognition to external rituals and stimuli" (Thornton, 2004, p. 41), and connect meaning with action. Frameworks direct behaviors and decisions through setting methodologies, activities, templates, acronyms, and definitions. For instance, Pollack, Costello and Sankaran (2013) found that a project management information system is an effective mechanism with which to govern the mentality of project managers by providing specific templates in planning, such as briefs, reports, approvals, and outcomes to be notified by the project manager (PM). According to these authors, decision-making processes and behaviors have been changed through the use of enforced templates.

Two aspects of frameworks improve project success. First, frameworks can provide legitimacy and acceptance for the agents (i.e., the project and benefits management agents) from other stakeholders. Second, by providing the templates and tools for decision-making, frameworks supply the apparatus for making effective decisions. Frameworks provide the organizing principles for members of the organization (Friedland and Alford 1991). They "refer to the belief systems and related practices that predominate in an organizational field" (Scott 2001: 139). They provide the belief systems which legitimize practices for actors (Pettersen & Solstad, 2014). These frameworks are also perceived as a factor in understanding how actors perceive and interpret the world (Thornton & Ocasio, 2012). Therefore, frameworks can determine the actors' expectations in terms of what they can and cannot do, their accountabilities, and their responsibilities (Scott, 2008). By applying the same concept, what the actors expect can be attached to their governing frameworks which have developed through their education, background, perceptions of themselves, and the perception of them by the agents around them (Hodgson & Paton, 2016).

According to the literature, the existence of different frameworks at the same time could lead to the domination of one of them (DiMaggio & Powell, 2000), their unchanged co-existence (Marquis & Lounsbury, 2007) or the development of new frameworks (Reay & Hinings, 2009). If the power of one of the frameworks is enforced through the chain of command in the organization's hierarchy, the structuring process will make the supporting logic dominate and over time will make all others fade as controlling mechanisms, (Thornton & Ocasio, 1999). For instance, running change projects through the Project Management Office, which is controlled by technical project managers, could undermine the framework of change management values in the organization (Terlizzi, Albertin, de Moraes & de, 2017). Thus, in the current research, we argue that having a mechanism to impose the two frameworks of the PM and BM could influence the success of transformation projects.

2.2. Project benefits management

The term 'benefits' has several definitions in English (Breese et al., 2015). The academic definition focuses on the following keywords: measurable, positive, benefits ownership, mechanism of change, change, and outcomes. Ward and Daniel (2006) defined benefit as "an advantage on behalf of a particular stakeholder or group of stakeholder". This definition creates a mentality of benefits ownership and focuses on a stakeholder's positive perception. Zwikael and Smyrk (2011) offered a more generic definition that focuses on flows of value from the initiative by taking account of the measurability of the benefits. The main weakness of their definition is that it lacks a definition of ownership. Others have focused on the required states of an organization, i.e. its desired outcomes, in order to realize this perceived value (e.g. (Mossalam & Arafat, 2015)). In other words, benefits are seen as arising from the completion of an activity and/or the accomplishment of outcomes

and/or resulting from the change. In this context, [Badewi \(2016\)](#) provided a comprehensive definition of ‘benefits’ that would cover all of these aspects. His definition focuses on the concept of project management mechanisms; that a benefit is “a measurable advantage owned by a group of stakeholders incurred by changing the current state through project management mechanisms”. This definition implies that the targeted benefit is delivered only if the current practices, norms, values, and power structure are recombined and amended in a purposeful way, which needs an effective control mechanism to deliver it.

The concepts of “project benefits management”, “benefits management”, and “benefits realization management” were first used in the late 1980s by [Farbey, Land and Targett \(1992\)](#) to investigate the reasons for the disappointing results of investment in changes led by technology. [Peppard and Ward \(1999\)](#) termed the concept “benefits management” for strategic information systems, and used it to refer to “bureaucratic structural arrangements for delivering value from investing in different technologies”. Following the same line of thought, [Serra and Kunc \(2015\)](#) conceptualized benefits management as a strategic governing mechanism that would ensure that all projects are aimed at delivering an organization’s strategy. The benefits management process involves identifying, planning, implementing, controlling, and exploiting benefits for new transformations ([Colin & Hodges, 2010](#); [Ward & Daniel, 2006](#)). These definitions come from an organization-based perspective in which the unit of analysis is the restructuring and recombining of an organization’s resources so as to realize value from investing in technologies in general and not from any particular project. From a project-based perspective, however, benefits management is defined as “the initiating, planning, organizing, executing, controlling, transitioning and supporting of change in the organization and its consequences as incurred by project management mechanisms to realize predefined project benefits” ([Badewi, 2016](#)). In line with this definition, the present research takes a project-based perspective to delineate the organization-wide benefits management approach and project-based benefits management practices.

The digital transformation project has various agents, as illustrated in [Fig. 1](#). [Romero, Paré and Khemici \(2017\)](#) identify the actors of the transitional process, who are expected to deliver success, as a project manager, benefits owners, and a benefits manager. The project manager is responsible for delivering the technological outputs. The benefits

owners are the ultimate users of the system and the ones who realize the benefits by changing their practices. The role of the benefits manager is to establish the benefits, propose a strategy for realizing them and harmonize the benefits management practices across the organization. The benefits manager, who is the leading business change manager and benefits auditor, is responsible for setting and leading the accountabilities and responsibilities for managing change through working to alter the behaviors and organizational culture, prepare the users, and educate the staff to realize the benefits from the technology ([Crawford & Nahmias, 2010](#)). It has been observed that the amount of change management activity is closely correlated with transformational changes in organizations ([Ronnenberg, Graham & Mahmoodi, 2011](#)). Change management—developing a systematic process of change, managing the triple adaptation of technology, the organization, and the business processes, identifying the size of the change, the stakeholders’ attitude to such change, and building change review procedures—requires dedication ([Bozarth, 2006](#)). Business change managers and project managers have different views and tools in leading their initiatives to prepare their organizations to accept and adapt their business practices to realize the promised benefits ([Pollack & Algeo, 2014](#)). [Crawford and Nahmias \(2010\)](#) identified that the framework of change managers makes them tend more to lead towards political diffusion, selling the change, noting the organizational structure, and changing behaviors and organizational culture, whereas the framework of project managers make them tend more to assessing systems, resolving issues and moving from project to operational.

The role of the benefits manager is unlike those of the business change manager and benefits auditor. A benefits manager operates at the portfolio level of management, guiding the actions and process of the BCMS and the BA to ensure consistency among the different transformation projects in the organization. The task of benefits manager is to ensure the accountability and responsibility of the benefits realization process by equipping the business change manager and benefits auditors with tools and guidance. The business change manager is responsible mainly for organizational changes required in one transformation project. The task of the benefits auditor is to review the realization of the benefits as planned in the transformation. Hence, this research proposes the role of benefits auditor as a critical role complementing that of the business change manager in the effective performance of benefits

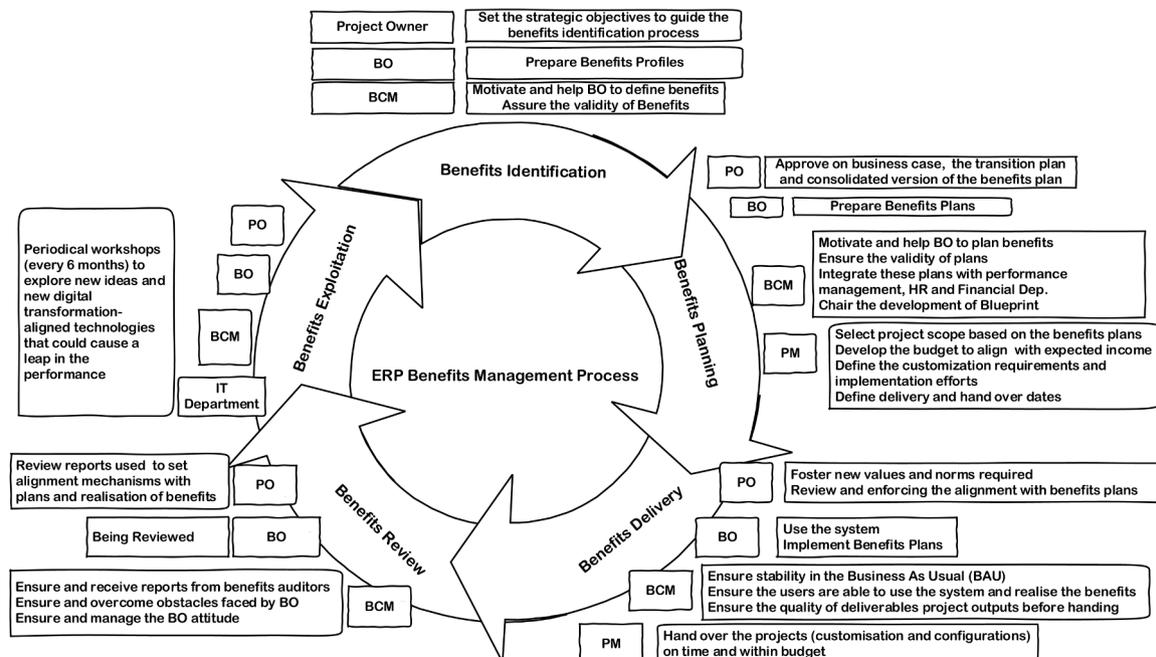


Fig. 1. PM and BM integrated transformation process.

management.

It is crucial to highlight the differences between the benefits owners and the business change managers. While the benefits owners are those employees whose behaviors should be altered to realize benefits, business change managers are those who are responsible for this change in the behavior. In other words, benefits owners are not aware which values, norms, and practices should be altered for successful transformation to take place. Because they are more committed to day to day operations, they are not capable of seeing the possible need for the change and also do not have the ability to enforce over themselves the accountability and responsibilities for getting the transformation done. Thus, there is a need for an external actor (from the transformed department) to identify and set the plan for shifting the benefits owners' perceptions, beliefs, attitudes, and values to align with successful transformation. Benefits owners should define the benefits to take ownership of them and be responsible for their delivery (Musawir et al., 2017); but the benefits change managers guide and motivate them to define these benefits. Similarly, to be responsible the benefits owners should define their plans for changing behaviors and business practices to realize the required benefits (Peppard, Ward & Daniel, 2007), while the BCM provides the workshops and tools to support them for writing these plans. The BCM can also consolidate these plans to ensure their consistency and develop a consolidated plan of benefits.

Besides the traditional definition of the roles involved in the transformation projects (Meredith and Zwikael, 2019; Romero et al., 2017) investigated and added to the role of the project owner in governing the whole transformation process as the key owner of the benefits. The project owner is the head of the department or someone in a senior position in the organization in which the transformation occurs, and their employees' business practices have to be altered in order to realize the benefits. The project owner's role is crucial because if the subordinates notice that their line managers are not interested in the process, they will not take the initiative seriously (Dupont & Eskerod, 2016). They should play a significant role in framing the benefits identification process by setting and clarifying the strategic objectives. They also have to feel that they can host this transformation by reviewing and approving the consolidated benefits plans. In the implementation, they need to enforce the new values and norms required for embracing the new business practices triggered by the technological intervention and adoption. They also need to use the benefits reviews as a means to ensure that the benefits plans are implemented and, should significant deviation arise, set the mechanisms required to ensure alignment with them. They also have to take part in the periodical meetings at which new benefits from the current investment are explored.

3. Theoretical framework

The main premise of this research is that the institutionalization of a certain framework in an organization empowers the agents by giving them legitimacy and acceptance, and improves their decision-making process, as illustrated in Fig. 2, below. This argument is proposed for both agents (i.e. the PM and the BM). There are three main hypotheses, concerning the effect of the power of the PM and BM over the transformation project on the success of this project, the effect of institutionalizing the PM and BM frameworks in an organization on the power of the PM and BM, and the mediating effect of the PM and BM on the relationship between the institutionalization by the PM and BM of the transformation project on the success.

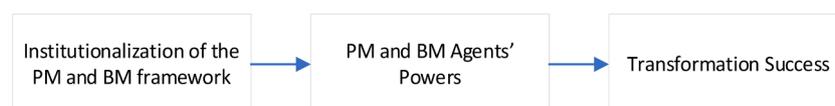


Fig. 2. Conceptual model.

Fig. 3.

The first proposed relationship is the effect of the power of the PM and BM in leading the transformation project on the project success. The relationship between the PM's power and project success has been investigated and examined in the literature (Kromidha, 2017; Paton, Hodgson & Cicmil, 2010; Sankaran, Vaagaasar & Bekker, 2019). For instance, project managers' autonomy over their decisions and resources is argued to be a critical factor for successful innovative projects (Willems et al., 2020). PM power can be operationalized as the level of autonomy over a PM's use of resources, or the ability to negotiate and influence the internal and external environment. This research favors the latter definition because it results from a broader perspective on power. In development projects for information systems, Sanchez, Terlizzi and de Moraes (2017) found that project managers had sufficient formal power to affect the delivery of these projects on time and within budget. Peslak (2006) revealed that the successful implementation of an Enterprise Resource Planning (ERP) project (in terms of time and cost) leads to the stakeholders' perception of its success. A project manager, who may be appointed by the supplier to develop technical capabilities, can have a significant influence on the users' measurement of the success of the project (Tsai et al., 2012).

Reducing the power of the digital transformation project manager results in scope creep, poor risk management, inadequate allocation of resources, and frustrated users pushing the organization to fail in its project investment (Chen, Law & Yang, 2009). Because of this, project management is found to be a predictor for the quality of digital transformation implementation and eventually of project success (Zhu et al., 2010).

This research argues that, like the importance of the power dedicated to the PM, power is also essential to the BM for successful ERP implementation. BM power has two roles: one in Business Change Management (BCM) and the other in auditing benefits. BCM power is proposed in this research to be a predictor of the digital transformation project success because such projects require uniting efforts to persuade the benefits owners to change their perceptions, attitudes, values, norms and practices in a consistent way to realize the required benefits. Thus, BCM as a transformation agent needs power to influence the benefits owners' behaviors and practices. To develop optimal change management strategies, the BCM needs to be empowered by having a full-time job and full dedication to absorb the organizations' politics and possible reasons for resistance. Similarly, the auditing of benefits is argued to be an integral duty in benefits management to ensure that the "ownership" of the benefits by the users/employees is in place (Ward & Daniel, 2006). Without such auditing, the appropriate governance system (i.e. accountability and responsibility) for delivering the benefits will malfunction and prevent anyone from being responsible for making the change to recoup the benefits from the investment in the digital transformation projects. Thus, the power dedicated to the project manager, business change managers and benefits auditors in the digital transformation project is proposed as an influence on its success.

Hypothesis 1. *The level of power possessed by the PM and BM over the digital transformation project has a positive effect on its success*

The institutionalization of practices refers to the process of embedding beliefs, norms, social roles, value or modes of behavior within an organization. If the organization repeatedly practices certain behaviors, they can be institutionalized over time. As explained by Burns and Quinn (2011), the more certain it is that practices are adopted, the more chance they have of being institutionalized because the practices

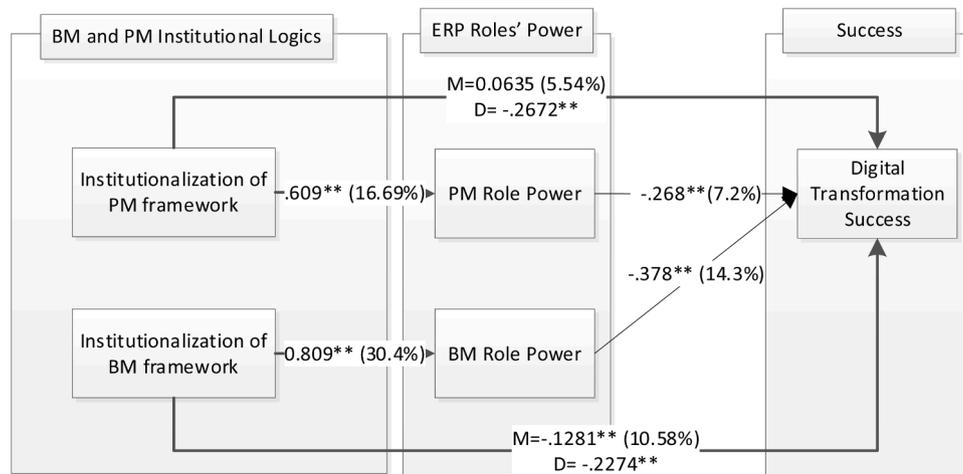


Fig. 3. Model of the governance of ERP project benefits.

become parts of the belief system of the agents and are reproduced involuntarily. It can be extrapolated from this argument that the more project management and benefits management practices are institutionalized, the greater the legitimacy and power of these agents become, because other agents will perceive the practices as norms and will value them. In other words, the existence of a framework in an organization will give power to its agents.

Hypothesis 2. *The level of institutionalization of the PM and BM in an organization has a positive effect on the power of the PM of the transformative project.*

Through updating and improving the templates, the Project Management Office (PMO) and Transformation Management Office (TMO) will be able to reflect the best practice and lessons learned in the decision-making process (Too & Weaver, 2014; Tsaturyan & Müller, 2015). Through these templates, the agents' decisions and perceptions are framed. Because organizations use certain PM software applications and templates in normal projects, the PM and BM of the transformation project will have to use the same templates in running their projects, in which the lessons learned are encrypted. Institutionalizing these templates and software applications (possibly due to the existence of Project and Transformation Management Officers (PMOs and TMOs) is proposed as a way of promoting the power of the roles of transformation project and benefits managers to successfully deliver success.

Hypothesis 3. *The institutionalization of the Project and Benefits management in an organization affects the success of the digital transformation project mediated by the power of the BM and PM's role.*

4. Methodology

A questionnaire was distributed through professional social media websites (LinkedIn) and by e-mails sent directly using Qualtrics software. This research used Enterprise Resource Planning (ERP) as an operationalization of the digital transformation initiative. Enterprise resource planning (ERP) is a transformative system that requires radical changes in the current business practices to fully absorb it and so recoup the required benefits (Badewi et al., 2018, 2020). The questionnaire was controlled for those organizations that implemented ERP for between one and three years, to ensure that respondents would be able to answer the questions on implementation and also to ensure the consistency of the data. The targeted audience consisted of ERP project/program/IT managers. Project managers are those who lead non-ERP projects in their organization, while ERP project managers are those who lead the implementation of ERP. Of the 223 responses received, 130 (representing 130 firms) were completed to the extent that they could be used

for the analysis. The sample characteristics are illustrated in Table 1. Geographically, they represent Europe, the USA, and Arab countries more or less equally; however, no differences in results were noted between countries or areas. About 50% of the respondents were project and program managers, and 17% were ERP project managers. These characteristics assured the consistency of the results.

4.1. Operationalization of constructs

The questionnaire aimed to measure the project management and benefits management framework in organizations, the power of the roles of PM and BM in a digital transformation project, and the success of this initiative.

4.2. Project management and benefits management framework

The extent to which project management frameworks are adopted in an organization's projects is measured by the degree to which that organization engages in the following practices in its IT projects: having a project charter before starting to implement a new IT project; reviewing cost plans periodically; reviewing time plans periodically; and implementing communication plans. The scale used was also used in an earlier study by Badewi (2016). This construct was found reliable and valid because its Cronbach's alpha was 0.815 and all items had a loading score of more than 0.6.

The benefits management framework was borrowed from Ward and Daniel (2006). This research developed constructs based on research undertaken by Badewi (Badewi, 2015). The framework was divided into four categories of practices: benefits identification, benefits audit, benefits accountability, and business case.

4.3. The power of the roles of BM and PM in the transformative project

The benefits management roles are those of benefits manager, business change manager, and benefits auditor. The benefits manager's role is that of a consultant who helps define the business change process. Thus, this research represents the benefits management roles by focusing only on business change managers and benefits auditors. The presence of a business change manager and a benefits auditor is crucial for the application of a benefits management framework. Likewise, the role of project management needs one actor at least: the project manager.

To measure the power of these roles, this research built on other research which indicates that firms undertaking projects give more power to a project manager, because a project manager has a full-time job with access to the required resources. However, appointing a

Table 1
Sample Characteristics used in applying a Project Benefits Governance Framework to ERP.

Country	N	%	Experience in ERP implementation	N	%	Positions	N	%
Arab Countries	25	19	0–3 Years	41	31	Project/program managers	63	48
Europe	30	23	4–8 Years	38	29	CIO/IT Managers/IT directors	26	20
USA	36	28	9–15 Years	25	19	ERP project managers	22	17
Others	39	30	More than 15 years	26	19	Missing (failed to specify)	19	15
Total	130	100	Total	130	100	Total	130	100

person to a particular role does not guarantee that s/he has all the power required by this role. Thus, the question was posed, “In implementing ERP, did you have one of the following roles?” There were five possible responses: not available, part-time but unsuccessful, part-time and successful, full-time but unsuccessful, and full-time and successful. After testing the validity and reliability of the construct, the two scales for a BM and a PM were found to be valid and reliable.

4.4. ERP success

Digital transformation project success is operationalized from two perspectives: the expectations of use and behavior (Lone & Lean, 2003); and the perception of project investment success (Zwikael & Smyrk, 2012). Therefore, respondents were asked to show their level of agreement on four aspects: ease of use, usefulness, return on investment, and the perception of its success. This construct is used in Badewi and Shehab (2016). The construct was found reliable and valid for analysis with a Cronbach’s alpha of 0.848 and all the factor loads for the construct above 0.6

5. Analysis

5.1. Measurement model

Concerning the validity of the scales, exploratory factor analysis (EFA) was employed, using principal component analysis with Varimax rotation to test the divergent validity of the constructs, as illustrated in Table 2. Based on the Kaiser-Meyer-Olkin (KMO) measure of sampling adequacy and Bartlett’s test of the significance of the dimension reduction process for testing validity, this process is valid with $P < 0.000$ and the sample characteristics for the dimension reduction process are adequate and accepted, as 0.884 (more than 0.6 is acceptable). Only the project management role failed to reach Cronbach’s value because it was a single-item construct (Tables 3 and 4).

Table 2
Exploratory factor analysis.

Rotated Component Matrix	Component				
	1	2	3	4	5
Cronbach’s Alpha	0.848	0.815	.786	.715	–
BM1_Business_Case	0.022	0.407	.597	.274	–0.071
BM2_Benefit_Audit	–0.348	0.058	.691	.316	–0.097
BM3_Benefits_identification	–0.072	.232	.779	.059	.221
BM4_Benefits_Accountability	–0.191	.185	.723	.143	.152
PM1_Project_Charter	–0.161	.581	.374	–0.197	.254
PM2_Reviewing_Cost_Plan	–0.112	.802	.256	.165	.092
PM3_Reviewing_Time_Plan	–0.134	.766	.114	.099	.308
PM4_imp_comm_plan	–0.130	.815	.146	.278	–0.064
ERP_Bus_Chan	–0.135	.255	.153	.765	.310
ERP_Benefit_Auditor	–0.217	.130	.342	.732	.029
ERP_PM	–0.127	.241	.161	.227	.822
ERP_Ease	.716	.007	–0.133	–0.246	.194
ERP_Usefulness	.817	–0.229	–0.027	–0.096	–0.097
ERP_ROI	.833	–0.149	–0.165	–0.020	–0.088
ERP_Succ	.833	–0.069	–0.162	–0.060	–0.230

Extraction Method: Principal Component Analysis.
Rotation Method: Varimax with Kaiser Normalization.
a. Rotation converged in 6 iterations.

This research took precautions against the possible presence of systematic errors related to the informants. The presence of respondent error (or common method bias) was tested using Harman’s single factor test, based on Podsakoff et al. (2003). It was conducted by inserting all the independent and dependent variables in an exploratory factor analysis. The first factor accounted for 30.71% of the total 88.40% variance, demonstrating a lack of evidence for considerable common method bias in this study.

5.2. Correlational analysis

Correlational analysis was used to find the relationship between the variables used in the analysis. Since the success of the transformation project is the focal point of this study, correlational analysis was used to rank factors in terms of their association with the success of the initiative. Ranking in terms of association runs as follows: the framework for managing the organizational benefit in terms of benefits audit, a benefits management framework in the firm in general, the power of the ERP PM, the power of the ERP benefits auditors, and the project management framework in the firm: 44.7%, 39.3%, 37.8%, 35.5%, and 34.5%, respectively, with $P < 0.00$. The lowest factors associated with ERP success are the benefits management framework in terms of writing business cases before starting projects and identifying benefits, the project management framework in terms of a project charter, reviewing the time plan, reviewing the communication plan, and implementing the communication plan: 18.4% ($P < 0.05$), 26%, 27%, 27.7%, 28.3%, and 28.7%, respectively. All of these factors are significantly associated with the success of ERP except for the business case as an organizational practice, where $P < 0.05$.

Descriptive analysis has certain insights that deserve noting. Using *t*-test analysis to compare means, the benefits management framework (indexed at 3.29) in organizations is significantly lower than the project management framework (indexed at 3.82) when $P < 0.00$. In addition, the power of the PM (indexed at 4.13) is significantly higher than that of

Table 3
Correlational analysis for variables used in testing the institutionalization of project benefits governance framework on ERP success.

	AVE	CCR	AVG	1	2	3	4	5	6	7	8	9	10	11	12	13	14
1.BM1_Business_Case	3.72																
2.BM2_Benefit_Audit	2.54			.491**													
3.BM3_Benefits_identification	3.56			.508**	.430**												
4.BM4_Benefits_Accountability	3.32			.351**	.538**	.562**											
5.BM	.491	.792		.749**	.794**	.790**	.790**	(0.701)									
6.PM1_Project_Charter	3.84			.358**	.262**	.416**	.318**	.431**									
7.PM2_Reviewing_Cost_Plan	3.85			.441**	.342**	.434**	.430**	.526**	.462**								
8.PM3_Reviewing_Time_Plan	4.09			.334**	.345**	.365**	.407**	.409**	.426**	.689**							
9.PM4_Imp_comm_plan	3.47			.458**	.257**	.329**	.361**	.449**	.466**	.636**	.569**						
10.PM	.558	.832		.497**	.339**	.473**	.455**	.563**	.748**	.854**	.797**	.836**	(0.747)				
11.ERP_Benefit_Auditor	3.10			.365**	.489**	.353**	.418**	.522**	.228**	.281**	.273**	.385**	.363**	.556**			
12.ERP_Bus_Chan	2.26			.371**	.344**	.363**	.335**	.452**	.229**	.411**	.347**	.408**	.429**	.449**			
13.ERP_BM_Power	2.68	.718		.417**	.472**	.405**	.437**	.552**	.259**	.392**	.351**	.450**	.449**	.881**	.883**	(0.748)	
14.ERP_PM_Power	4.13	-		.284**	.230**	.319**	.293**	.360**	.341**	.379**	.446**	.296**	.444**	.416**	.263**	.385**	
15.ERP_Ease	3.32			.118	.394**	.176	.232**	.197**	.065	.196**	.074	.166	.158	.158	.283**	.214*	.127
16.ERP_Usefulness	2.62			.167	.343**	.184*	.233**	.299**	.293**	.308**	.285**	.264**	.355**	.263**	.315**	.327**	.248**
17.ERP_ROI	2.77			.180*	.370**	.263**	.290**	.355**	.274**	.212	.272**	.290**	.324**	.333**	.220*	.313**	.219*
18.ERP_Succ	2.63			.141	.383**	.241**	.339**	.356**	.247**	.215	.272**	.223*	.293**	.301**	.286**	.333**	.291**
19.ERP_Success	0.642	.877		.184*	.447**	.260**	.329**	.393**	.270**	.283**	.277**	.287**	.345**	.355**	.313**	.378**	.268**

OSQRT(AVE).

AVE, Average.

AVE, Average Variance Extracted.

CCR, Composite Construct Reliability.

** Significant at the 0.01 level.

*Significant at the 0.05 level.

the BM (indexed at 2.68) in organizations where $P < 0.00$. Interestingly, the top prevailing logic in corporate organizations is to review the time plan, with an average score of 4.09, although it seems to have one of the weakest correlations with successful ERP (27.7%, $P < 0.00$). The logic embraced least often is that of the benefits audit, which has the greatest association with ERP success (44.7%, $P < 0.00$).

5.3. Hypothesis testing

The hypothesis analysis obeyed Hayes’s instructions for pursuing mediating analysis (Hayes, 2013). The strongest impact on the transformation project success with the highest explanatory ratio, is the institutionalization of benefits management in the organization ($b = 0.378$, $P < 0.01$, $R^2 = 14.3\%$). The lowest impact on the success is the PM’s power in the transformation project ($b = 0.268$, $P < 0.01$, $R^2 = 7.2\%$). Both impacts show significant confirmation of Hypothesis 1. The research found strong and significant supporting evidence that institutionalizing the project management ($b = 0.609$, $P < 0.01$, $R^2 = 16.69\%$) and benefits management framework ($b = 0.809$, $P < 0.01$, $R^2 = 30.04\%$) influenced the success of a transformation project. This provided evidence to support Hypothesis 2.

The mediation analysis partially confirmed Hypothesis 3. Regarding the power of the benefits management roles to mediate, there was a significant indirect impact ($b = 0.128$, $P < 0.00$, $R^2 = 10.58\%$) from the institutionalization of BM on the project’s success. The research failed to find evidence that the influence of institutionalizing the project management framework on the transformation project success could be mediated by the power of the PM, since the mediation impact ($b = 0.0635$) and the explanatory ratio ($R^2 = 4.5\%$) were insignificant.

6. Discussion

This research aimed to spotlight the influence of institutionalizing project and benefits management frameworks on project success. Some studies, such as Badewi (2016), Badewi (2015) and Serra and Kunc (2015), cover the BM framework. However, none of the previous research in the literature on project benefits management integrated the concept of institutionalizing this framework on the power of the BM roles. This research found that institutionalizing the framework of PM and BM agents improves the organization ability to deliver successful digital transformation project.

This research contributes to knowledge in the field by developing and testing a framework which shows that the institutionalization of the benefits management framework gives dominance to its agents and could help in the success of their work. Like other studies showing that a framework gives power to its owners (Lok, 2010), the present research has shown that the organizational institutionalization of project management and the practices of benefits management underpinning their framework give their owners power to lead the technical work (i.e., the technical configuration and customization) and the organizational work (i.e., benefits management) that delivers transformation success. This research, while supporting other findings that the integration of different organizational and technical levels (Grant et al., 2013), and a good organizational fit (Nwankpa, 2015) were needed for success, contributed to their arguments by applying their findings at the level of the agent, who endorses the technical and social aspects of the transformation process from a manual system to a fully electronic system. In addition, this research extends the findings of Kwahk and Ahn (2010) that a positive attitude to business-driven changes is necessary for successful digital transformation, evidenced by demonstrating the importance for an organization of having an agent (i.e., a benefits manager) empowered with the required, accepted, and normalized benefits framework.

This research presents six key findings. First, frameworks empower their owners. This research confirms that the greater the power of the change agents, the greater the success that can be realized. On the

Table 4
Hypotheses testing.

H	Independent	Mediator	Dependent	Direct Impact	Indirect Impact	Total Impact	R ²	Support
H1	PM Power		ERP Success			-0.268**	7.2%	Support
H1	BM Power		ERP Success			-0.378**	14.3%	Support
H2	PM Framework		PM Power			.6090**	19.69%	Support
H2	BM Framework		BM Power			.809**	30.47%	Support
H3	PM Framework	PM Power	ERP Success	-0.2672**	.0635	-0.3275**	5.54% (Mediation)	No mediation
H3	BM Framework	BM Power	ERP Success	-0.2274**	-0.1281**	-0.3371**	10.58% (Mediation)	Support

transformation project level, according to the descriptive analysis, benefits management frameworks are still immature and are weaker than project management frameworks, although benefits management frameworks have shown their importance in realizing transformation success. These results are aligned with those of Serra and Kunc (2016) that benefits management does not dominate in the way that project management practices do.

Second, it is shown that the power associated with a BM's role in an organization weakens in relation to the power of the PM's role. This research presents no clear justification for this phenomenon, but it may stem from not having a transformation management officer as a main agent for empowering the BM role. In the academic literature, the role of the BM is not clear and it is often integrated with the role of the project owner or program manager (Meredith & Zwikael, 2019), which is believed by the project owner to surpass all others (Breese, Couch & Turner, 2020). The current research argues for different roles to allow space for the BM framework to be fostered and empowered.

Third, it was found that benefits management frameworks are more important for transformation success than project management frameworks. This seems to contradict the conclusions of Badewi (2016) and Svejvig and Schlichter (2020), who found that project management frameworks are essential for successful projects. We argue that the results imply no contradictions. Instead, we believe that the results complement each other: the project management is the main framework for establishing successful delivery while the purpose of benefits management is to set the direction of the transformation process; this is as much as to say that good planning is essential for success, but without a proper direction, this success could be meaningless. In addition, this research focuses on institutionalizing frameworks during projects through scripting them in the organization's DNA, whereas other research focuses on the use of benefits management in one project at a time (Badewi, 2016; Svejvig & Schlichter, 2020). Extending this focus can give us a more comprehensive view of the value not only of having benefits management in transformation projects, but also of fully integrating this logic in normal projects.

Fourth, PM and BM frameworks could enforce and direct agents' behaviors, which, over time, affect the outcomes of a project. This research found certain frameworks to be critical to success, regardless of their rarity, while other frameworks may be quite rare, but are still found to dominate. The most common logic prevailing in organizations is reviewing the time plan, but it is one of the frameworks least associated with project success. This does not support Badewi (2016) or Dvir and Lechler (2004), which argued that reviewing time plans is critical to project success. The reason for this difference is that these papers focus on the technical definition of project success and focus on normal projects. The present research focuses mainly on large transformational projects (i.e. the ERP system). The logic gives prominence to reviewing the delivery of the technical artifacts, regardless of outcome. Delivering on time seems to be a more decisive logic, which perhaps diverges from human behavior, since it is more stochastic and difficult to plan.

Fifth, regarding benefits management frameworks, the benefits case is used extensively; but this has not shown itself to be of any importance to the success of digital transformations. This does not support the findings of Nielsen and Persson (2017), which advocated the use of it in IT government projects. They used action research methodology,

adopting best practice in developing such business cases as a tool for planning and reviewing. However, it seems from this research that the norm in using business cases may be different. This could be due to problems in practicing it, as defined by its not being a "neutral" process (Breese, 2012). In addition, it may be due to the way in which they are understood and how they are used. Business cases could be seen as mechanisms employed by a project initiator or by project owners to convince senior management or perhaps as planning mechanism. Other frameworks are undervalued in organizations but found in practice to be critical. In spite of the failure to adopt benefits auditing logic, it has been found to be the factor most closely associated with successful project transformation. This result supplements Badewi (2016) by showing that benefits management practices are critical for project management success in general. This research found similar results regarding the success of transformations.

Sixth, the mediating analysis has explained in two ways the impact of institutionalizing the framework on the success of a transformation project. First, the power of benefits management roles is found to be in mediating the relationship between the framework and success. Second, frameworks could be useful in themselves without the need to be mediated by the power of their agents. Although project management frameworks affect the power of the PM and the PM's power affects ERP success, this research failed to find supporting evidence that the PM's power is that of a mediator between the project management framework and ERP success. However, it can be clearly shown that it has an impact on other agents' frameworks in dealing with the change. What can be confirmed in this study is that the project management framework and the power of a transformation project manager play important roles in successful transformations.

There is a puzzle here: why does the power of agents mediating the relationship between benefits management framework and success not apply to project management framework in relation to success? The reason may be that business change managers and benefits auditors occupy internal roles, whereas the transformation project manager may be either internal or outsourced. The project management framework could enhance the project owner's or the sponsor's decision regarding the importance of hiring a full-time PM and delegating authority, but not necessarily controlling the project management agents' behavior or decisions. This research has not controlled for whether an ERP project manager is external or internal to an organization.

7. Implications

This study has several implications. First, since the institutionalization of project and benefits management frameworks are found to affect the success of transformation projects such as ERP systems, organizations need to invest in project management and benefits management frameworks to empower the relevant managers in the workplace. This investigation has revealed the importance of these frameworks in empowering an organization's agents. Second, full-time project managers and benefits managers are necessary for realizing benefits. It is difficult to find people adopting any technology without change agents. Benefits management tools are important: auditing the benefits sets the liability and accountabilities on the owners of benefits to work towards achieving these benefits. Benefits need to be at the core of any digital

transformation initiatives. Third, project management and benefits management should work together to realize a specific blueprint that ensures a good fit between the technical and social systems. Fourth, the institutionalization of benefits management may need an active agent to own and foster the framework. Thus, it is highly recommended to invest in a Transformation Management Officer (TMO) who should aim to enforce and study the organizational frameworks in running transformation projects so that these frameworks can be institutionalized successfully in the organization's DNA. Fifth, this study argues the need to dedicate more space to benefits management as a professional career with dedicated certificates.

8. Limitations and conclusion

There are operationalization, methodological, and conceptual assumptions underpinning this inquiry. Criticizing each of these assumptions will open avenues to new research in the relationships between management frameworks and success.

The operationalization assumptions lie in the measurement of power and the institutional frameworks in this work. This study operationalized power in terms of the level of dedication of the manager in the time spent on the project as a proxy of the power held by this person. Thus, a future researcher can consider devising a more comprehensive scale for measuring this power. Power as a concept can indicate several dimensions (e.g. the dedication of resources, organizational position or informal power in terms of relationships and knowledge). A possible fruitful enquiry in the future can assess the impact of institutionalizing the frameworks on different types of knowledge and possible mediation roles on different aspects of project success (e.g. project sponsor success, project investment success and project management success). Institutionalizing the frameworks is assessed through the level of adopting these frameworks in "normal" day to day projects. Institutionalization can be assessed by the level at which the values, norms, and practices of project and benefits management are embraced. This perspective on assessing the institutionalization of the framework requires interpretive and qualitative research for its delineation and mapping. Studying it at such depth will improve our understanding of project and benefits management values, norms, and practices in the hope of establishing robust and effective transformation and project management offices.

The methodological assumptions of this study include the use of ERP in digital transformation projects and the efficacy of using a questionnaire as the main mechanism to capture situations which may be judged subjectively. The ERP used a case study for the digital transformation project because it entailed changes in most of the organizational practices and the deployment of technology in most of the main business practices (e.g. accounting, purchasing, marketing, and production). However, digital transformation projects may also include the use of Artificial Intelligence and optical technologies. This study should be replicated in other digital transformation projects. The second assumption was the value of a questionnaire for assessing the power and institutionalization of frameworks which are more interpretive as constructs. This can be compensated for, however, by another piece of action research or phenomenological study that observes and documents the governing process and the role of the allocation of power in the successful delivery of transformation projects.

The conceptual assumption concerns the hidden roles of the PMO and TMO in the transformation process. This research investigated the institutionalization of the frameworks but it does not explicitly mention who should take ownership of the institutionalization process. In organizational transformation projects the roles of PMOs and TMOs in institutionalizing the PM and BM frameworks are still not clear. In theory, the PMO and TMOs can improve the chances of success, but the precise functions of TMOs and PMOs (i.e. consulting or directive) are not yet clear, nor is it certain that the integration of PMO and TMO in one office could improve the synergy between the PM and BM roles in an organization.

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