

Enhanced Project Benefit Capture at a Collaborative Life Sciences Non-Profit



PROJECT OVERVIEW

A global, not-for-profit alliance of life science companies, software vendors, publishers, and academic groups – focused on lowering barriers to innovation in R&D – was facing mounting funding challenges. Although the organization delivered high-value, pre-competitive projects and hosted interactive communities that advanced industry standardization, regulatory alignment, and collaborative learning, it lacked a systematic way to capture, document, and communicate the benefits of these efforts.

The gap created several critical issues:

- Promising project ideas struggled to secure initial funding.
- Ongoing projects faced renewal challenges due to limited visibility into delivered value.
- Members lacked clear insight into the outcomes they were helping to drive.
- Business development and project management teams lacked the materials needed to recruit new steering committee members.
- Many early-stage projects operated at a deficit before sufficient sponsors could be secured.

To address these challenges, the organization engaged Kalleid, leveraging our expertise in process optimization and value-capture frameworks to design a standardized approach for documenting and communicating project benefits.

BUSINESS CASE

The organization delivered substantial value through collaborative projects that no single member could execute alone. However, the absence of structured benefit documentation created several challenges:

- **Ideas Not Converting to Funded Projects:** Without a clear mechanism to articulate expected value, member-generated ideas often stalled before launch.
- **Difficulty Renewing Funding:** Multi-year projects lacked documented evidence of delivered value, making it harder for participants to secure internal approvals.
- **Limited Member Awareness:** Success stories were not consistently translated into ready-to-use marketing collateral.
- **Challenges Recruiting New Members:** Without timely, tailored examples of project value, business development teams struggled to attract new steering committee participants.
- **Early-Stage Funding Gaps:** Projects frequently operated at a loss in their initial phases due to insufficient early commitments.



These issues stemmed not from a lack of value, but from missing structured processes and tools. Key gaps included:

- **No formal process** for capturing expected and delivered benefits.
- Project managers **lacked training or experience** in collecting benefit-related data.
- **No standardized templates** for documenting or sharing value.
- End-of-project reviews **lacked essential benefit** information.
- Steering committee members **lacked tailored return-on-investment (ROI)** messaging for renewal discussions.

SERVICES PROVIDED

Kalleid delivered a focused, three-phased engagement designed to rapidly assess current practices, pilot new tools, and prepare the organization for scale-up. A single Kalleid expert worked closely with a diverse team that included senior leaders, project managers (PM), marketing and business development staff, and member stakeholders for customer insights (Voice of the Customer, or VoC) input to ensure broad alignment.

PHASE 1: Quick Assessment and Initial Design (6 weeks)

Objective: Understand current project management practices and design a practical, value-capture framework.

- **Focused Process Review:** Conducted targeted discussions with leadership, business development, and the entire project management team to identify gaps in documenting and communicating project benefits.
- **Voice of the Customer Analysis (VoC):** Interviewed board members and project funders; surveyed 200+ members (168 responses) to identify the most compelling value drivers.
- **Core Template Design:** Developed and tested a project kickoff template defining success criteria, expected outcomes, and a “Minimum Viable Product” (MVP) version of value.

PHASE 2: Pilot Testing and Basic Training (12 weeks)

Objective: Validate the new tools and refine them through real-world use.

- **Pilot Program:** Applied the new Benefit Capture Template to two projects and one community to obtain quick feedback on its effectiveness.
- **Standard Marketing Documentation:** Created a funding justification pitch deck to support recruitment and internal advocacy.
- **Benefit Capture Process Flow:** Mapped a simple end-to-end process for using benefit data throughout the project funding lifecycle.
- **Basic PM Training:** Delivered a practical cheat sheet and provided on-demand coaching for project teams.

PHASE 3: Feedback Collection and Next Steps (4 weeks)

Objective: Gather feedback, refine tools, and prepare for broader adoption.

- **Feedback and Revision:** Gathered and analyzed feedback from PMs, marketing, and business development to refine templates and pitch materials.
- **Final Report:** Delivered a comprehensive summary of findings, recommendations, and scale-up discussions.
- **Internal Training:** Reviewed all collateral with the impacted teams and addressed any remaining questions regarding use and scale-up.

RESULTS DELIVERED

Launched in July 2025 and completed in December 2025, this project established a robust, scalable framework for capturing and communicating project value.

Key outcomes included:

- **A standardized Benefit Capture Template and supporting process flow.**
- **A marketing-ready pitch deck to support recruitment and renewal conversations.**
- **Clear, prioritized recommendations for low-effort, high-impact improvements.**
- **Strengthened internal confidence through coaching and simplified processes.**
- **Improved predictability of project funding, enhanced steering committee transparency, and greater external visibility of project successes.**

Overall, the initiative boosted the organization to secure funding more reliably, communicate value more efficiently, and scale benefit-capture practices across all projects and communities.



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