



[Your Company Name]


[Your Tagline]


Business Case

[YEAR]

Prepared By

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1.

Executive Summary



REMEMBER

The Executive Summary is the first page of your business plan (for Readers), but it should be the last chapter you write. It acts as both the introduction to, and the summary of, your entire idea. It is a short summary of the entire business case. It succinctly conveys vital information about the project and communicates the entire story to the reader.

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2.

Business Problem

Environmental Analysis (include Business Process as applicable)

Problem Analysis

Environmental Analysis (include Business Process as applicable)



TIP

Outline the core aspects of the business environment which have derived the need for this project to take place. These may include:

- Business Vision, Strategy, or Objectives
- Business processes or technologies which are

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TIP

Describe the current as-is business process. May be combined with the Description of the Problem section.

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Current Business Process

Start writing here...



TIP

List and describe the business goals and objectives the project will satisfy.

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Objectives

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Problem Analysis



TIP

Outline the fundamental business problem or opportunity which the resulting project will directly address.

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TIP

Provide a summary of the core business problem, including:

- A generic description of the core issue to hand
- The reasons why the problem exists
- The elements which create it (e.g. human, prod

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Business Problem

Start writing here...



TIP

Provide information about the opportunity in terms of the current business process, the market trends, competitive environment, and expected market penetration if a feasibility study is not available to provide this context information. Outline the business opportunity which has been identified including:

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Business Opportunity

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3.

Available Options

Option 1

Option 2



REMEMBER

This section provides a full listing of all solution options, their benefits, costs, feasibility, risks, and issues. Options suggested may include doing nothing, doing something that will achieve a similar result, or doing something that will achieve a better result than current performance. Try to minimize the number of options available by conducting a detailed Feasibility Study.

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Option 1



TIP

Provide a summarized description of the option identified. This will include the general approach to be taken and a summary of the core elements of the solution (e.g. people, process, organization, technology).

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Description

Start writing here...



TIP

Describe the tangible and intangible benefits to the company upon the implementation of the solution. One of the obvious benefits described will be that the business problem/opportunity outlined above will be addressed. Complete the following table:

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Benefits, Goals and Measurement Criteria

| Category | Benefit | Value |
|-------------|---------------------------------------|-------|
| Financial | • New revenue generated | \$ x |
| | • Reduction in costs | \$ x |
| | • Increased profit margin | \$ x |
| Operational | • Improved operational efficiency | x % |
| | • Reduction in product time to market | x hrs |
| | • Enhanced quality of product/service | x % |

| Category | Benefit | Value |
|----------|--|------------------------|
| Market | <ul style="list-style-type: none"> Increased market awareness Greater market share Additional competitive advantage | x % x % Describe |
| Customer | <ul style="list-style-type: none"> Improved customer satisfaction Increased customer retention Greater customer loyalty | x % x % Describe |
| Staff | <ul style="list-style-type: none"> Increased staff satisfaction Improved organizational culture Longer staff retention | x % Describe x % |



TIP

Describe the tangible and intangible costs to the company upon the implementation of the solution. The costs of the actual project should be included (e.g. equipment procured) as well as any negative impact on the business resulting from the delivery of the project (e.g. operational downtime). Complete the following table:

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Costs and Funding Plan

| Category | Cost | Value | Budgeted |
|----------|--|-------|----------|
| People | • Salaries of project staff | \$ x | YES |
| | • Contractors / outsourced parties | \$ x | NO |
| | • Training courses | \$ x | YES |
| | | | |
| Physical | • Building premises for the project team | \$ x | NO |
| | • Equipment and materials | \$ x | NO |
| | • Tools (computers, phones...) | \$ x | NO |
| | | | |

| Category | Cost | Value | Budgeted |
|----------------|-----------------------------------|----------|----------|
| Marketing | • Advertising/branding | \$ x | YES |
| | • Promotional materials | \$ x | NO |
| | • PR and communications | \$ x | NO |
| Organizational | • Operational downtime | \$ x | NO |
| | • Short-term loss in productivity | \$ x | NO |
| | • Cultural change | Describe | NO |

Identify Funding Sources and Amounts:

| Funding Source | Amount | Notes |
|----------------|--------|-------|
| | | |
| | | |
| | | |
| | | |



TIP

Describe the feasibility of the solution. To adequately complete this section, a Feasibility Study may need to be initiated to quantify the likelihood of achieving the desired project result. To assess the overall feasibility of this option, break the solution down into components, and rate the feasibility of each component in the following table:

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Feasibility

| Component | Rating (1-10) | Method Used to Determine Feasibility |
|----------------|---------------|---|
| New Technology | 5 | A technology Prototype was created to assess the solution |
| New People | 8 | A survey was completed to identify skill-set availability |
| New Processes | 3 | Processes within similar organizations were reviewed |
| New Assets | 9 | Physical assets were inspected |



TIP

Summarizes the most apparent risks associated with the adoption of this solution. Risks are defined as “any event which may adversely affect the ability of the solution to produce the required deliverable”. Risks may be Strategic, Environmental, Financial, Operational, Technical, Industrial, Competitive or Customer related. Complete the following table:

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Risks

| Description | Likelihood | Impact | Mitigating Actions |
|---|------------|-----------|--|
| Inability to recruit skilled resource | Low | Very High | Outsource the project to a company with proven industry experience and appropriately skilled staff |
| The technology solution is unable to deliver the required results | Medium | High | Complete a pilot project to prove the technology solution will deliver the required results |
| Additional capital expenditure may be required in addition to that approved | Medium | Medium | Maintain strict cost management processes during the project |



TIP

Summarize the highest priority issues associated with the adoption of this option. Issues are defined as “any event which currently adversely affects the ability of the solution to produce the required deliverables”. Complete the following table:

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Issues

| Description | Priority | Resolution Actions |
|---|----------|--|
| Required capital expenditure funds have not been budgeted | High | Request funding approval as part of this proposal |
| Required computer software is only at the ‘beta’ phase and has not yet been released live | Medium | Design solution based on the current software version and adopt changes to solution once the final version of the software has been released |

| Description | Priority | Resolution Actions |
|--|----------|--|
| Regulatory approval must be sought to implement the final solution | Low | Initiate the Regulatory approval process early so that it does not delay the final roll-out process. |



TIP

List the major assumptions associated with the adoption of this option.
Examples include:

- There will be no legislative, business strategy, or policy changes during this project

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Assumptions

Start writing here...

Option 2



TIP

As defined above in **description** section of Option 1

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Description

Start writing here...



TIP

As defined above in **Benefits, Goals and Measurement Criteria** section of Option 1

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Benefits, Goals and Measurement Criteria

Start writing here...



TIP

As defined above in **Costs and Funding Plan** section of Option 1

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Costs and Funding Plan

Start writing here...



TIP

As defined above in **Feasibility** section of Option 1

To unlock help try Upmetrics!

Feasibility

Start writing here...



TIP

As defined above in **Risks** section of Option 1

To unlock help try Upmetrics!

Risks

Start writing here...



TIP

As defined above in **Issues** section of Option 1

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Issues

Start writing here...



TIP

As defined above in **Assumptions** section of Option 1

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Assumptions

Start writing here...

4.

Recommended
Option

Option Rankings

Option Recommended



REMEMBER

This section compares the key characteristics of each solution option and recommends a preferred solution option for implementation.

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Option Rankings



TIP

Identify the criteria by which each of the solution options will be assessed. Then agree on a rating mechanism for each criterion so that ratings can be added to determine a total score for each option. NB Ratings may be weighted to stress the importance of the criteria being assessed. Complete the following table:

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| Criteria | Option 1 | Option 2 | Option 3 |
|---|---------------|---------------|---------------|
| Benefits <ul style="list-style-type: none"> • Increased revenue • Reduced expenditure • Improved efficiency • Enhanced quality • Other | [1-10 Rating] | [1-10 Rating] | [1-10 Rating] |
| Costs <ul style="list-style-type: none"> • People • Physical • Marketing • Organizational • Other | | | |
| Feasibility <ul style="list-style-type: none"> • Technology components • People components • Process components • Asset components • Other | | | |

| Criteria | Option 1 | Option 2 | Option 3 |
|--|----------|----------|----------|
| Risks <ul style="list-style-type: none"> • Resourcing • Technology • Organizational • Other | | | |
| Total Score | | | |

Option Recommended



TIP

Based primarily on the highest Total Score achieved above, list here the 'Recommended Option' for Business Case approval. Summarize the primary reasons why this option was chosen over the other options previously identified.

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5.

Implementation Approach

Project Initiation

Project Planning

Project Execution

Project Closure

Project Management



REMEMBER

This section provides an overview of the general approach undertaken to deliver the preferred solution option and derive the resultant business benefits.

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Project Initiation



TIP

Outline the method by which the project will be defined, the project team formulated and the project office established.

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Project Planning



TIP

Define the overall planning process to ensure that the project phases, activities, and tasks are undertaken in a co-ordinated fashion.

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Start Writing here...

Project Execution



TIP

Identify the generic phases and activities required to complete the 'build' phase of the project.

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Start Writing here...

Project Closure



TIP

List the generic steps necessary to release the deliverables to the business (once complete), close the project office, reallocate staff, and perform a Post Implementation Review of the project.

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Project Management



TIP

Describe in brief how the following aspects of the project will be managed:

- Time Management
- Cost Management
- Quality Management

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6.

Appendix

Supporting Documentation

Supporting Documentation



TIP

Attach any documentation you believe is relevant to the Business Case. For example:

- Problem / Opportunity research materials
- Feasibility Study research materials

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