<Project Name>

Business Case

Document Control

This is a controlled document. The control and release of this document is the responsibility of the document owner.

|  |  |  |  |
| --- | --- | --- | --- |
| Issue Control | | | |
| **Issue** | [Issue] | **Date** | [Date] |
| **Classification** | [Classification] | **Author** |  |
| **Document Title** | [Project Name] | | |
| **Approved by** |  | | |
| **Released by** |  | | |

|  |  |
| --- | --- |
| Owner Details | |
| **Name** |  |
| **Department** |  |
| **Contact Number** |  |
| **E-mail Address** |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Revision History | | | |
| Issue | Date | Author | Comments |
| Draft 0.1 |  |  | Initial Draft |
|  |  |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Distribution List | | | |
| Name | Title | Company | Contact Info. |
|  |  |  |  |
|  |  |  |  |

Table of Contents

[1 Executive Summary 1](#_Toc427590494)

[2 Business Case Overview 2](#_Toc427590495)

[2.1 Purpose of the Document 2](#_Toc427590496)

[2.2 Intended Audience 2](#_Toc427590497)

[2.3 Scope of the Business Case 2](#_Toc427590498)

[2.4 Data Sources and Methods 2](#_Toc427590499)

[3 Project Introduction 3](#_Toc427590500)

[3.1 Project Description 3](#_Toc427590501)

[3.2 Current Business Situation 3](#_Toc427590502)

[3.3 Strategic Alignment 3](#_Toc427590503)

[4 Business Assessment 4](#_Toc427590504)

[4.1 Project Solution Overview 4](#_Toc427590505)

[4.2 Business Impact 4](#_Toc427590506)

[4.3 Stakeholder Impact 4](#_Toc427590507)

[4.4 Alternatives Considered 4](#_Toc427590508)

[5 Qualitative Analysis 5](#_Toc427590509)

[5.1 Qualitative Analysis Overview 5](#_Toc427590510)

[5.2 Qualitative Benefits 5](#_Toc427590511)

[6 Quantitative Analysis 6](#_Toc427590512)

[6.1 Quantitative Analysis Overview 6](#_Toc427590513)

[6.2 Quantitative Benefits 6](#_Toc427590514)

[6.3 Sensitivity Analysis 6](#_Toc427590515)

[6.3.1 Cash Flow Model Inputs and Assumptions 6](#_Toc427590516)

[6.3.2 Best Case, Worst Case, Most Probable Scenarios 6](#_Toc427590517)

[7 Risk Analysis 7](#_Toc427590518)

[7.1 Business Risks 7](#_Toc427590519)

[7.2 Technology Risks 7](#_Toc427590520)

[7.3 Other Risks 7](#_Toc427590521)

[7.4 The “Do Nothing” Risk 7](#_Toc427590522)

[8 Contingencies and Dependencies 8](#_Toc427590523)

[8.1 Overview 8](#_Toc427590524)

[9 Action 9](#_Toc427590525)

[9.1 Recommendations 9](#_Toc427590526)

[9.2 Implementation Approach 9](#_Toc427590527)

[9.3 Next Steps 9](#_Toc427590528)

[Acronyms & Abbreviations 10](#_Toc427590529)

Table of Tables

[Table 1: Business Impact 4](#_Toc426977209)

[Table 2: Stakeholder Impact 4](#_Toc426977210)

[Table 3: Alternatives Considered 4](#_Toc426977211)

[Table 4: Qualitative Benefits 5](#_Toc426977212)

[Table 5: Quantitative Benefits 6](#_Toc426977213)

[Table 6: Acronyms & Abbreviations 10](#_Toc426977214)

# Executive Summary

<Provide an Executive Summary of the entire document. All of the information in this section should be at a summary level and must be consistent with the rest of business case document. This section is always the last one to be completed.>

# Business Case Overview

## Purpose of the Document

<Provide the purpose of the Business Case document.>

## Intended Audience

<Describe the intended audience for this document. Audience members may include senior leadership, operations teams, entire departments or any other person(s) or group(s).>

## Scope of the Business Case

<Describe the scope of the Business Case. Scope elements can include departments, business units or geographic locations. Also describe what is out of scope for the document.>

## Data Sources and Methods

<Describe all of the information sources used for the development of the document.>

# Project Introduction

## Project Description

<Describe the business need, issue or system change - Why should it be done and what are the implications of not doing it? Describe the scope of the project from a business perspective including its key objectives, deliverables and purpose.>

## Current Business Situation

<Provide a thorough understanding of the issues facing the organization, and conclusions about what is wrong or underperforming or opportunities available to the organization>

## Strategic Alignment

<Describe how the project aligns with the overall corporate strategy and priorities. What strategic objectives does the project support?>

# Business Assessment

## Project Solution Overview

<Describe the high level solution to address the business problem and/or meet certain business requirements.>

## Business Impact

<Describe the impact to the business that this project solution will create (both positive and negative impacts.>

Table 1: Business Impact

|  |  |  |
| --- | --- | --- |
| # | Business Unit / Department | Impact |
|  |  |  |
|  |  |  |

## Stakeholder Impact

<Describe the impact to the stakeholders that this project solution will create (both positive and negative impacts.>

Table 2: Stakeholder Impact

|  |  |  |
| --- | --- | --- |
| # | Stakeholder | Impact |
|  |  |  |
|  |  |  |

## Alternatives Considered

<Describe all of the alternatives that were considered to address the business need. Consider all factors, such as modifications or repairs of existing systems, solutions that deliver the same (or acceptable) results without requiring a large capital investment, lease options instead of build or own options, etc.>

Table 3: Alternatives Considered

|  |  |  |  |
| --- | --- | --- | --- |
| # | Solution Option | Pros | Cons |
|  |  |  |  |
|  |  |  |  |

# Qualitative Analysis

## Qualitative Analysis Overview

<Provide a qualitative analysis of the overall project solution. Qualitative benefits include those ‘soft’ or ‘intangible’ benefits that are not a part of the cash flow financial model. Such benefits include increased morale, improved corporate image, enhanced knowledge base, increased customer loyalty, improved collaboration, etc.>

## Qualitative Benefits

<Provide a summary of expected qualitative outcomes. Objectives should be specific, measurable, achievable, realistic and timely (SMART).>

Table 4: Qualitative Benefits

|  |  |  |
| --- | --- | --- |
| # | Qualitative Benefit | Description |
|  |  |  |
|  |  |  |

# Quantitative Analysis

## Quantitative Analysis Overview

<Provide a quantitative analysis of the overall project solution. Quantitative benefits include those ‘hard’ or ‘tangible’ benefits that are included in the cash flow financial model. Such benefits include items produced, loans approved, deliveries made, items sold, etc.

Provide a detailed summary of the output of the cash flow model.>

## Quantitative Benefits

<Provide a summary of expected quantitative outcomes. Objectives should be specific, measurable, achievable, realistic and timely (SMART).>

Table 5: Quantitative Benefits

|  |  |  |
| --- | --- | --- |
| # | Quantitative Benefit | Description |
|  |  |  |
|  |  |  |

## Sensitivity Analysis

### Cash Flow Model Inputs and Assumptions

<Describe the relevant inputs and assumptions that were made in building out the cash flow model. Discuss how changes to these inputs and assumptions affect the overall results of the cash flow model.>

### Best Case, Worst Case, Most Probable Scenarios

<Describe best case, worst case and most probable scenarios.>

# Risk Analysis

## Business Risks

<Describe the business risks of the project and the corresponding mitigation plans.>

## Technology Risks

<Describe the technology risks of the project and the corresponding mitigation plans.>

## Other Risks

<Describe all other relevant risks of the project and the corresponding mitigation plans.>

## The “Do Nothing” Risk

<Describe the risk of not executing and completing this proposed project.>

# Contingencies and Dependencies

## Overview

<Describe all contingencies and dependencies, to include areas such as management teams, departments, technology, products and processes.>

# Action

## Recommendations

<Based upon all of the findings and analysis within the Business Case, provide clear and succinct recommendations.>

## Implementation Approach

<Provide, at a high-level, the approach to implementing the project.>

## Next Steps

<Provide next steps based upon the business requirements.>

Acronyms & Abbreviations

Acronyms/abbreviations are defined the first time they’re used in this document. The entire acronym/abbreviation is listed first, then the acronym/abbreviation is enclosed in parentheses. The consolidated list of acronyms/abbreviations is listed below.

Table 6: Acronyms & Abbreviations

|  |  |
| --- | --- |
| Acronym / Abbreviation | Description |
| NPV | Net Present Value |
| IRR | Internal Rate of Return |
| ROI | Return on Investment |
| WACC | Weighted Average Cost of Capital |
| PV | Present Value |
| FV | Future Value |
|  |  |
|  |  |
|  |  |
|  |  |

Acceptance Signoff

[Project Name]

Business Case

We have reviewed and agreed to the information described in this document and referenced attachments.

|  |  |
| --- | --- |
| Acceptance Signoff Signature | |
| [Signoff Authority Name & Title] | Date of Acceptance |
| [Signoff Authority Name & Title] | Date of Acceptance |
| [Signoff Authority Name & Title] | Date of Acceptance |
| [Signoff Authority Name & Title] | Date of Acceptance |