# Sample Business Case Template

# Title or Cover Page

## A very brief front cover description of what is being presented. Consider including on the Title or Cover Page some of these suggestions:

### Title of the document, should include the project name

### Sub-title if appropriate to add clarity to the main title

### Presented by author(s)

### Prepared for (Audience)

### Presentation Date

# Versioning Page

## May be appropriate on complex project documents requiring comprehensive review processes that result in multiple document revisions. Small or less complex projects may not need a version page

## If a versioning page is considered necessarily, information may include

### Original creation date

### Version or edit dates

### Summary of revisions or corrections, by whom

### Additional comments as appropriate

# Executive Summary

## A concise high-level summary version of the entire report. How well this is written will influence the readers to read your report detail. These should be included in the Executive Summary:

### Opportunity description

### Desired outcome

### Major factors

### Required resources

### Expected Return on Investment (ROI)

### Proposed timeline

## Include your sections in the same order as the full report. This helps the readers quickly find their areas of interest in the document

## This is usually prepared after the full document is created to align with high impact points

# Table of Contents

## Provides the reference structure for the main content elements

## Is usually written after the document is complete

## Recommended to keep to no more than one page

# Opportunity Statement

## Clear statement of opportunity or business problem being addressed

## Identifies key issues to be addressed

# Situational Analysis

## Detailed information consistent with opportunity statement and alternatives

## Background and history information

## Perception of current state

## Projections from current state

## Work that may have already been done

# Solution Options

## Identify potential solution options with sufficient detail

## Identify critical assumptions

# Evaluation of Options

## Contains the evaluation relative to the key criteria. Answers what, why, how, and who

## Key decision criteria

## Costs and benefits

## Operational and customer impacts

## Required resources

## Organizational capability

## Work needed to deliver objective

## Key interdependencies

### Completion of other projects

### Availability of key personnel

### Risks associated with failure of interdependencies

## Identify areas impacted

### Own department

### Other internal departments

### External entities

# Financial Analysis

## Key component of the evaluation

## Include associated costs and benefits for each option, including no-action scenario

## Consider every associated cost

## Affordability of project and predicted Return on Investment (ROI)

## Identify predicted budget and cash flow implications

## Include level/degree of confidence in these estimates

# Recommendations

## Summarize your recommended option

## Explanation of supporting reasoning

## Identify next steps

### Who is responsible for project implementation

### Major schedule milestones

### Possible project staging

# Appendix

## Supporting material and documents arranged relative to document order