Business Project Worksheet

An important tool that we will be using throughout this process is the **Business Project Worksheet**. This Worksheet provides a logical structure for the information you will be collecting and supports the format of the Business Case that you will be developing. Each training session will go through specific sections of the worksheet in chronological order. Below, you will find an annotated version of the form and on the following page a blank Worksheet to use.

| **Business Project Worksheet** |
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| **Business Problem/Opportunity Statement**1-2 paragraphs summarizing your Business Project |
| **Situation Analysis*** Background and History
* Perception of Current State
* Projections if current state continues
* Work that may have already been done
* Financial, operational impacts
 |
| **Research Plan*** Information needed from home property
* Key questions of Speakers/Matches
* What to look for on Tours/Site Visits
* Written information or data needed
 |
| **Evaluation of Options**The what, why and how questions of the project* List all Options (including NO ACTION)
* Identify Critical assumptions
* Required resources
* Required resources
* Organizational capability
* Key interdependencies
	+ Completion of other projects
	+ Availability of key personnel
	+ Risks associated with failure of interdependencies
* Identifies areas impacted
	+ Own department, Other internal departments, External entities
* Key decision criteria
	+ Benefits
	+ Costs
	+ Operational
	+ Customer impacts
 |
| **Recommended Path Forward*** Summarize preferred recommendation
* Reasoning supporting recommendation
* Identify next steps
	+ Who is responsible for project implementation?
	+ Major schedule milestones
 |

| **Business Project Worksheet** |
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| **Business Problem/Opportunity Statement** |
| **Situation Analysis** |
| **Research Plan** |
| **Evaluation of Options** |
| **Recommended Path Forward** |

**Business Case**

Written or verbal presentation that is intended to educate a decision maker and convince them to take some kind of action. The proposed scope influences size and detail of the document.

**Producing Business Case Document(s) from your Business Project Worksheet**

1. **Remove the Research Plan**

*Do* include who you talked to and where you collected data in the *Evaluation of Options* and *Recommended Path Forward* sections

1. **Add Implementation Plan Section**

Include the basic timeline, resources required, and costs of implementation

1. **Add Executive Summary**

Typically written after the reminder of document is finished, sometimes is the only section an Executive reads, includes essential points in the same order as the full document

***Proposed scope influences size and detail of document***

| **Business Case for Project Name** |
| --- |
| **Executive Summary** *Typically written after the reminder of document is finished, sometimes is the only section an Executive reads, includes essential points in the same order as the full document;** Business Problem/Opportunity Statement
* Situation Analysis
* Evaluation of Options
* Recommended Path Forward
* Implementation Plan
 |
| **Business Problem/Opportunity Statement***may be refined from your original statements as you have collected specific information during your research.*  |
| **Situation Analysis***Includes your situation analysis* |
| **~~Research Plan~~**Eliminate this section, but discuss who was inter viewed and data/documents collected and reviewed as part of your Evaluation of Options and Recommended Path Forward sections |
| **Evaluation of Options***Detailed list of all available options (including DO NOTHING, evaluated against Decision Criteria you identified. It is important to evaluate all options against all criteria, so that readers of your Business Case will understand why you have made your decision.* *RISK, should also be addressed in this section for each option. The risk of implementing the solution and the risk of not implementing the solution should both be discussed as applicable to each option.*  |
| **Recommended Path Forward***Ranking of Options, Identification of option selected and reasoning, any risks and associated mitigation* |
| **Implementation Plan***Discuss the basic framework for the implementation of the recommended option. Include; Basic timeline, resources required, costs of implementation*  |

| **Business Case for \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** |
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| **Executive Summary**  |
| **Business Problem/Opportunity Statement** |
| **Situation Analysis** |
| **Evaluation of Options** |
| **Recommended Path Forward** |
| **Implementation Plan** |