Business Case

Project Details

Project:

Project Sponsor:

Project Manager:

Proposed project start date:

Estimated project completion date:

Document Details

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| Version | Modifications | Author | Date |
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Executive Summary

This section should highlight the key points summarising the business case.

Background

This section should describe the context of the project, providing insight into the history of the business and how the organisation works.

Problem Statement

This section should describe the business problem or business opportunity that this project was created to address.

Project Description

This section should describe the detailed information about the proposed project. Any information relating directly to this project should be summarised.

Scope

This section should explain the scope of the project.

Reasons

This section should explain all reasons for undertaking the project, the objectives and the improvements being made to the organisation. It may be presented in the following format:

|  |  |
| --- | --- |
| Goal/Objective | Reason |
|  |  |
|  |  |
|  |  |
|  |  |

Business Options

This section should include the analysis and recommendations for the business, providing options on alternatives if this project does not go ahead or is not approved. It may be presented in the following format:

|  |  |
| --- | --- |
| No Project | Reasons |
|  |  |
|  |
|  |
| Alternative Option ‘A’ | **Reasons** |
|  |  |
|  |
|  |
| Alternative Option ‘B’ | **Reasons** |
|  |  |
|  |
|  |

Expected Benefits

This section should include the benefits that the project is expected to deliver. This should be presented against the organisations current situation.

Expected Dis-benefits

This section should list the outcomes that may be perceived as negative by the stakeholders.

Organisational Impact

This section should describe how the proposed project will affect the organisations processes. It should also highlight any existing roles that may change, or any new roles created upon completion of the project.

Strategic Alignment

This section should provide an indication of the strategic organisational plans that relate to the project, including how the project supports the organisations strategic plan.

|  |  |  |
| --- | --- | --- |
| Plan | Goal/Objective | Relationship to the Project |
|  |  |  |
|  |  |  |

Timescale

This section should include the estimated time the project will run until benefits are realised. It should also include a summary of the project plan.

Milestones

This section should list the milestones and their targeted completion dates. It may be presented in the following format:

|  |  |  |
| --- | --- | --- |
| Milestone | Description | Delivery Date |
|  |  |  |
|  |  |  |

Costs

This section should summarise all estimated project costs. It may be presented in the following format:

|  |  |  |
| --- | --- | --- |
| Item | Cost | Total |
|  |  |  |
|  |  |  |
|  |  | **£** |

Investment Appraisal

This section should compare the estimated project costs to the benefits of the project. It should also address how the project will be funded. It may be presented in the following format.

|  |  |  |  |
| --- | --- | --- | --- |
| Action | Type | Description | First Year Costs |
| Action ‘A’ | Cost | Description | £100,000 |
| Action ‘B’ | Saving | Description | -£400,000 |
| Action ‘C’ | Saving | Description | -£500,000 |
|  |  |  |  |
| Net First Year Savings |  |  | **£800,000** |

Major Risks and Issues

This section should summarise any known risks and issues connected to the project, their likely impacts and mitigation plans. It may be presented in this format:

|  |  |  |  |
| --- | --- | --- | --- |
| Issue | Details | Likelihood | Resolution Plan |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Risk | Details | Likelihood | Mitigation Plan |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

Dependencies

This section should outline any known dependencies and may be presented in the following format:

|  |  |
| --- | --- |
| Dependency | Depends On |
|  |  |
|  |  |
|  |  |

Assumptions

This section should list initial assumptions for the proposed project.

Constraints

This section should list initial constraints for the proposed project.

Business Case Analysis Team

This section should describe the role of all team members who partook in developing the business case.

|  |  |  |
| --- | --- | --- |
| Name | Role | Description |
|  |  |  |
|  |  |  |
|  |  |  |

Approval

This section should allow the document to get signed off. It may be presented in the following format:

Upon signing this document, I give formal approval that the proposed project, outlined in this business case, may continue to the next steps.

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** |  | **Signature** |  |
| **Role** |  | **Date** |  |