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Business Case Template – Project with One Approach
Rev. 1.0, March, 2013

Sample: For Evaluation Only


Business Case Template

| | |
|--|--|
| Project Name: | |
| Project Sponsor: | |
| Author:  | |
| Prepared for:  | |
| Submission Date:  | |

Comment [.1]: Name and position of the person responsible for writing this Business Case.

Comment [.2]: Names of the individual(s) and or group(s) for whom this Business Case was prepared.

Comment [.3]: Date that the Business Case was submitted for review. Use the format MM/DD/YYYY

| Document History | | | |
|------------------|------|--|-------------------|
| Version | Date | Author  | Reason for Change |
| 1.0 | | | |
| | | | |
| | | | |
| | | | |

Comment [.4]: Name of the person who modified the content.

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Pages 1-3 and Section 2.1 are provided for your review

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How to use this Business Case template

This template consists of three parts:


Part 1: Project Overview. This section of the template provides a general description of the project. The Business Case author is asked to provide background information, a problem (or opportunity) statement, and some information about priority, stakeholders and project risk.

Part 2: Project Approach. This section of the template provides a detailed description of the proposed project approach. The Business Case author is asked to provide detailed information about project value, cost, timing, risk, assumptions and other important data.

Part 3: Funding Action. Management can use this signature block to indicate their decision about this project.

It must be understood that numeric estimates of value, cost and time presented in this Business Case are very likely at an ORDER OF MAGNITUDE level (i.e. +/- 50 to 70%). More precise estimates will not be available until project planning is completed, which can only happen after the project has been approved and funded. Estimates provided in this document should NOT be used to establish project baselines for cost or time, except where there are legitimate constraints that cannot be avoided. Project baselines should be established in funded projects late in the Planning phase, when project scope has been firmly established and there is confidence in the underlying data.

This Business Case template is designed to consolidate and display the results of analyses that are carried out using a companion analytical tool, **SWAG-Meister**, which can be used for estimation of project and post-project cost. In addition, a Financial Analysis Worksheet that can be used for Net Present Value calculations is provided in the Appendix to this template.

- Extensive inline help is provided in this template. Mouse over the  symbol to see it.

Note: In this sample document, help text is shown to the right as Comments

- In order to check or uncheck a checkbox , double click the box, select Default = Checked or Not Checked, click OK
- *<Italic text within angle brackets is instructional and should be removed from the final document.>*

Comment [.5]: Congratulations! You have found inline help.






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2. Project Approach Details

The following is an in-depth description and analysis of the purpose, methods, impact, timing, cost, risk and other vital information pertaining to the proposed project approach. This information is intended to guide decision makers as they consider this project for funding and execution approval.

| 2.1. Project Approach | |
|--|--|
| 2.1.1 Proposed Project: Describe the proposed project. | |
| What is the purpose of this project?  | |
| Describe the project  | |
| What would this project deliver?  | |
| 2.1.2 Technology | |
| Yes <input type="checkbox"/> No <input type="checkbox"/> ?? <input type="checkbox"/> | This project includes the introduction of new or additional technology  |
| If the answer to the above is Yes, then answer the following. If No, proceed to section 2.1.3 | |
| Yes <input type="checkbox"/> No <input type="checkbox"/> | The new technology is consistent with the current Technical Architecture If No, explain below |
| Yes <input type="checkbox"/> No <input type="checkbox"/> | The new technology is consistent with the current Security Model If No, explain below |
| Yes <input type="checkbox"/> No <input type="checkbox"/> | There will be need for post-project maintenance and/or support If Yes, explain below |
| Yes <input type="checkbox"/> No <input type="checkbox"/> | There will be need for follow-on Disaster Recovery or Business Continuity planning If Yes, explain what is needed and how it will be done. If No, explain why it is not needed. |
| Explain : | |
| 2.1.3 Business Process | |
| Yes <input type="checkbox"/> No <input type="checkbox"/> ?? <input type="checkbox"/> | The project includes a change in Business Process  |

Comment [.18]: This section of the Business Case focuses on demonstrating the net value of a specific project approach. In order to gain approval, a project must do the following:

- Answer business needs of importance to stakeholders
- Provide stakeholder value
- Ensure that project deliverables support operational effectiveness and efficiency
- Support organizational, legal and regulatory requirements as needed
- Include governance, operational and other structures as needed to ensure continued delivery of value over the long term

Comment [.19]: What will this project approach accomplish? To what extent will it address the problem / opportunity described above?

Comment [.20]: In general terms, describe how you would carry out this project.

Comment [.21]: For example, in a software project deliverables could include a software application, training, updated business process, updated Standard Operating Procedures, updated Position Descriptions and the results of Organizational Adoption work.

Comment [.22]: Technology can include, for example, new software application, computers, manufacturing equipment, etc. If the impact on Technology is not known, check ??

Comment [.23]: Check Yes if the project will change a Business Process. Any project that includes implementation of a Commercial Off the Shelf or Software as a Service product almost certainly includes a change in Business Process. If the impact on Business Process is not known, check ??

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| 2.1. Project Approach | |
|--|--|
| If the answer to the above is Yes, then answer the following. If No, proceed to section 2.1.4 | |
| Describe the type and amount of impact that the change could have on people, e.g. the workforce, middle management or others | |
| | |
| Yes <input type="checkbox"/> No <input type="checkbox"/> | The project includes an Organizational Adoption component If the answer is No, explain why it is not needed. |
| | |
| 2.1.4 Project Duration: How long is the project expected to take? | |
| Project Duration: | |
| Confidence in Estimate: | <input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low |
| Underlying Assumptions: Describe the assumptions that were made to determine project duration | |
| | |
| Project Milestones: List any planned project milestones and describe each | |
| Milestone | Milestone Description |
| | |
| | |
| | |
| | |
| 2.1.5 Out of Scope: List out of scope items | |
| | |
| 2.1.6 Current Vs. Future State: Use text or graphic | |
| | |
| 2.1.7 Alternatives: Were alternatives to the approach described here considered? If so, briefly describe each and explain why it was rejected. | |
| Description of Alternate Approach | Reason for Rejection |
| | |

Comment [.24]: Examples of this include adoption of new work practices, use of new equipment, changes in how decisions are made or in who makes them, and reorganization.

Comment [.25]: Organizational Adoption is the work that is done to ensure that change is accepted and project deliverables are used.

Comment [.26]: It is important to have a formal and precise definition of Project Duration. For example: Project Duration can be defined as the time from the date on which Project Planning formally begins (e.g. first date on which work hours are charged to the project) to the date on which the Project Sponsor signs off on a Project Acceptance document. Preferred: provide the following estimates of Project Duration: Most Likely, Minimum (at a 10% probability) and Maximum (at a 10% probability) estimates.

Comment [.27]: Indicate how confident you are that the project can actually be done in the time indicated. High = +/- 20%; Medium = +/- 50%; Low = +/- 70%

Comment [.28]: Example: Assumptions can relate to - Who does the work; how many staff are assigned; how long a vendor will take to make delivery; complexity of the work; who performs support and maintenance

Comment [.29]: A milestone is a point of time in the project when something has happened, e.g. a body of work was completed, a decision was made, some condition was met, etc. Do not provide completion dates; these will not be known until project planning is completed.

Comment [.30]: Describe any scope items (e.g. deliverables, features) that stakeholders might think are in scope, but actually are not included in this approach to the project.

Comment [.31]: Describe (or provide graphics that depict) current state as it exists today, and a future state that would exist upon project completion using this project approach, with indications of how the changes will relate to addressing the problem or opportunity of concern. Consider impact on organizational structure, business process, information technology (e.g. hardware and software), employees, location, etc.