Business Case Meeting Invite

[Project Name]

[Author Name]

[Company]

[Project Name]

**What:  Set up a 30-minute meeting with the Sponsor.**

**Why:  In this meeting, you will get the answers to the questions in the Business Case.  (You are *facilitating* the Business Case document creation)**

**Your to-do steps to create the meeting:**

1. **Create a new meeting invite (go to your meeting/email tool and click “Create New Meeting”)**
2. **On the ‘new meeting invite’ screen** 
   1. **Fill in the To and CC (using the template below)**
   2. **Fill in the Subject (using the template below) - Change the [Project Name] below to your actual project name**
   3. **Choose a Date/Time for the meeting (using the template below)**
   4. **Fill in the Body (using the template below)**
   5. **Click Send!**

**Remember:  You may be contacted by the Sponsor asking you to change the Sponsor or with general questions - just be ready, answer and coordinate as needed**

**Template**

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| **To** | ***Fill in the Sponsor (listed in your Stakeholder Matrix)*** |
| **CC (Carbon Copy)** | ***Fill in the Sponsor Backups/Delegates (Optional, listed in your Stakeholder Matrix) and your manager*** |
| **Subject** | **[Project Name] - Facilitation of Business Case creation** |
| **Date/Time** | **Check the "scheduling assistant" feature in your email tool for an open & available 30 minute day/time.  - Schedule the call for tomorrow (if business day) or the next business day. If there are no open options - select the next soonest open day/time slot.** |
| **Body** | **Hi team!**  **I am the project coordinator on this initiative, and I am working on the facilitation of the Business Case for it.**  **What is the purpose of this call?: I would like to have a quick call to facilitate the creation of a Business Case for this initiative. Having a solid Business Case is a precursor to project approval and a key asset to move forward.**  ***It is possible that a Business Case already exists, if so, we can discuss that in the call – or feel free to email the details directly to me.*  Why am I receiving this call invite? You have been identified as a potential sponsor of this initiative.  If you believe this is in error, please send me an email.  If you would like to delegate or add colleagues to this, please forward this invitation directly to the colleagues who you would like to add or delegate to. Agenda**   1. **Opening and Introductions** 2. **Quickly review the below details which are needed for the Business Case** 3. **Next steps** 4. **Closing**   **Details which are needed for the Business Case**   * **Executive Summary – A high-level overview of the project, its objectives, and expected benefits.** * **Problem Statement/Opportunity – A clear explanation of the issue or opportunity the project addresses.** * **Project Objectives – Specific, measurable goals aligned with business strategy.** * **Scope and Deliverables – A description of what the project will achieve and its keyoutputs.** * **Strategic Alignment – How the project supports organizational goals and priorities.** * **Cost-Benefit Analysis – Estimated project costs, potential financial returns, andnon-financial benefits.** * **Risks and Mitigation Strategies – Key risks, their potential impact, and plans to addressthem.** * **Stakeholder Analysis – Identification of key stakeholders and their roles in the project.** * **Implementation Plan – A high-level timeline, milestones, and resource requirements.** * **KPIs and Success Criteria – Metrics to measure project success and expected outcomes.** * **Recommendation & Conclusion – A final justification for moving forward with the project.** |
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