

Business Case Simplifier Template

A business case outlines the justification for undertaking a project or investment. This simplified version focuses on clarity, value, and decision-making, helping teams present strong cases without unnecessary complexity.

1. Purpose of This Tool

- ☐ Provide a concise structure for developing and evaluating business cases.
- ☐ Ensure alignment with organisational strategy and priorities.
- ☐ Support clear decision-making with evidence and measurable value.
- ☐ Avoid excessive documentation and focus on outcomes.
- ☐ Encourage accountability for results and return on investment.

Tip: A great business case tells a clear story — what problem exists, what you propose to do, and why it matters.

2. Project Overview

Field	Description
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Project Title	
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Sponsor	
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Date Prepared	
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Version	
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Author / Owner	
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- ☐ Use this section to summarise the essentials at a glance.

Tip: Keep this section factual and concise — one paragraph per field is enough.

3. Executive Summary

Question

Response

What is the project or proposal about?

Why is it needed now?

What are the expected outcomes and benefits?

What are the key costs and risks?

☐ Keep this to a single page so decision-makers can quickly grasp the core message.

Tip: Write the executive summary last, once all other sections are complete.

4. Problem or Opportunity Statement

Question

Response

What problem does this project solve or what opportunity does it capture?

What evidence supports the need for action?

What will happen if nothing is done?

☐ Define the problem clearly before discussing the solution.

Tip: Decision-makers approve clarity and reject confusion — define your “why” first.

5. Strategic Alignment

Strategic Goal How This Proposal Supports It

☐ Link your business case directly to one or more organisational priorities.

☐ Demonstrate how it contributes to long-term strategy.

Tip: Projects that align with key strategies gain faster approval and stronger support.

6. Options Analysis

Option	Description	Advantages	Disadvantages	Estimated Cost	Preferred (Yes / No)
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Do

Nothing

Option A

Option B

☐ Include a “Do Nothing” option to clarify the cost of inaction.

☐ Evaluate each alternative fairly and factually.

Tip: A balanced options analysis shows credibility and transparency.

7. Recommended Option

Recommended Option Justification Expected Outcome

☐ Summarise the preferred approach and why it offers the best value.

☐ Include a brief rationale for rejecting other options.

Tip: Keep the recommendation short, direct, and defensible.

8. Financial Summary

Category	Estimated Cost (£)	Expected Benefit (£)	Net Value (£)	Payback Period
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Capital

Investment

Operational Cost

Savings / Revenue

Total

☐ Use realistic, evidence-based figures.

☐ Where possible, include sensitivity analysis for high-risk estimates.

Tip: Always state assumptions clearly when presenting financials.

9. Risk and Mitigation Summary

Risk Likelihood (L/M/H) Impact (L/M/H) Mitigation / Control Owner

- ☐ List the most significant risks only.
- ☐ Assign owners to ensure accountability for mitigation.

Tip: Highlight risks openly — credibility improves when challenges are acknowledged.

10. Implementation Plan

Phase Key Activities Owner Start Date End Date Deliverables

Phase 1

Phase 2

Phase 3

- ☐ Provide an overview of the main phases of implementation.
- ☐ Keep detail to a level suitable for executives.

Tip: A clear plan demonstrates readiness and builds confidence in delivery.

11. Benefits Realisation Plan

Benefit Type (Financial / Non-Financial) Measure Owner Target Date Status

- ☐ Define who will track each benefit and how it will be measured.
- ☐ Include both tangible and intangible benefits.

Tip: Benefits must be tracked beyond project delivery to prove success.

12. Approval Summary

Approver Role Decision (Approved / Declined / Deferred) Date

☐ Record all key approvals for traceability and governance.

Tip: Maintaining a simple record of approvals builds accountability and transparency.

How to Use This Template

Use this template for any business case requiring management review or funding approval. Keep it concise and data-driven, avoiding unnecessary jargon. When used consistently, this tool improves clarity, decision quality, and confidence across the organisation.

Notes