

# HOW TO PREPARE A POWERFUL BUSINESS CASE



If you've struggled to articulate business case (idea or recommendation), then this worksheet may help you. Please note, this worksheet doesn't allow enough space to articulate enough information to support formally proposing a business case. You may opt to use this worksheet as a first draft... then organize a PPT presentation, or word document with more complete information. "Complete Information" does NOT mean verbose. Keep everything concise, always. When you transfer from this worksheet to a presentation, use the left column as your headers and your supporting information as the body. Don't rush, make sure each section is completed with your end goal in mind. If you need to do some research to support a point, please do. A critical part of presenting a business case is to communicate effectively and concisely. Use this as an opportunity to tap into your BRILLIANCE!

KEY AREAS TO PREPARE A BUSINESS CASE	SUPPORTING INFORMATION
<p><b>SITUATION OVERVIEW</b> Start with the basics. Describe what you are doing now, and what is the problem. Use enough detail that if this were passed along to your managers manager, who may be removed from this work, they would understand. Also, keep it concise! Cover the important facts.</p>	
<p><b>AUDIENCE: WHO HAS THE POWER TO ACCEPT OR PASS?</b> Are you trying to convince a colleague, another business unit, your boss, multiple stakeholders? Do you know what's most important to them? If so, this is very important to keep in mind as you think about how to present your case)</p>	
<p><b>KEY BENEFITS</b> What impact will this case have on your business, for example better customer relations, greater efficiency, increased accuracy, will allow time for other priorities, etc.</p>	
<p><b>COST TO EXECUTE</b> Include a high-level overview of what your business case will cost. If you don't have hard numbers, make the best-informed estimate you can. Do the research needed. Always identify assumptions as such.</p>	
<p><b>PROJECTED REVENUE GENERATION/ RETURN ON INVESTMENT (ROI)</b> (include multi-year projections is possible)</p>	
<p><b>TIMING</b> How long will it take to plan, implement, and deploy this project? I highly recommend making a project plan using another sheet.</p>	
<p><b>MEASURING SUCCESS</b> How will success be measured? How often will performance be measured? Who is responsible for managing the project? If multiple people, list them along with which aspect of this project they will be looking after. If something doesn't work out, how will it be addressed/corrected?</p>	