****

<TITLE>

**BUSINESS CASE**

COMPANY NAME

STREET ADDRESS

CITY | STATE | ZIP CODE

WEB ADDRESS

MM/DD/YYYY

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## Executive Summary

This section should provide general information on the issues surrounding the business problem and the proposed project or initiative created to address it. Usually, this section is completed last after all other sections of the business case have been written. This is because the executive summary is exactly that, a summary of the detail that is provided in subsequent sections of the document.

## Issue

## This section should briefly describe the business problem that the proposed project will address. This section should not describe how the problem will be addressed, only what the problem is.

## Anticipated Outcomes

This section should describe the anticipated outcome if the proposed project or initiative is implemented. It should include how the project will benefit the business and describe what the end state of the project should be.

## Recommendation

This section summarizes the approach for how the project will address the business problem. This section should also describe how desirable results will be achieved by moving forward with the project.

## Justification

This section justifies why the recommended project should be implemented and why it was selected over other alternatives. Where applicable, quantitative support should be provided and the impact of not implementing the project should also be stated.

## Business Case Analysis Team

This section describes the roles of the team members who developed the business case. It is imperative that participants and roles are clearly defined for the business case as well as throughout the life of the project.

| **Role** | **Description** | **Name/Title** |
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## Problem Definition

## Problem Statement

This section describes the business problem that this project was created to address. The problem may be process, technology, or product/service oriented. This section should not include any discussion related to the solution.

## Organizational Impact

## This section describes how the proposed project will modify or affect the organizational processes, tools, hardware, and/or software. It should also explain any new roles which would be created or how existing roles may change as a result of the project.

## Technology Migration

This section provides a high-level overview of how the new technology will be implemented and how data from the legacy technology will be migrated. This section should also explain any outstanding technical requirements and obstacles which need to be addressed.

## Project Overview

This section describes high-level information about the project to include a description, goals and objectives, performance criteria, assumptions, constraints, and milestones. This section consolidates all project-specific information into one chapter and allows for an easy understanding of the project since the baseline business problem, impacts, and recommendations have already been established.

## Project Description

This section describes the approach the project will use to address the business problem(s). This includes what the project will consist of, a general description of how it will be executed, and the purpose of it.

## Goals and Objectives

This section lists the business goals and objectives which are supported by the project and how the project will address them.

| **Business Goal/Objective** | **Description** |
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## Project Performance

This section describes the measures that will be used to gauge the project’s performance and outcomes as they relate to key resources, processes, or services.

| **Key Resource/Process/Service** | **Performance Measure** |
| --- | --- |
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## Project Assumptions

This section lists the preliminary assumptions for the proposed project. As the project is selected and moves into detailed project planning, the list of assumptions will most likely grow as the project plan is developed. However, for the business case there should be at least a preliminary list from which to build.

## Project Constraints

This section lists the preliminary constraints for the proposed project. As the project is selected and moves into detailed project planning, the list of constraints will most likely grow as the project plan is developed. However, for the business case there should be at least a preliminary list from which to build.

## Major Project Milestones

This section lists the major project milestones and their target completion dates. Since this is the business case, these milestones and target dates are general and in no way final. It is important to note that as the project planning moves forward, a base-lined schedule including all milestones will be completed.

| **Milestones/Deliverables** | **Target Date** |
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## Strategic Alignment

All projects should support the organization’s strategy and strategic plans in order to add value and maintain executive and organizational support. This section provides an overview of the organizational strategic plans that are related to the project. This includes the strategic plan, what the plan calls for, and how the project supports the strategic plan.

| **Plan** | **Goals/Objectives** | **Relationship to Project** |
| --- | --- | --- |
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## Cost Benefit Analysis

Many consider this one of the most important parts of a business case as it is often the costs or savings a project yields which win final approval to go forward. It is important to quantify the financial benefits of the project as much as possible in the business case. This is usually done in the form of a cost benefit analysis. The purpose of this is to illustrate the costs of the project and compare them with the benefits and savings to determine if the project is worth pursuing.

| **Action** | **Action Type** | **Description** | **First year costs (- indicates anticipated savings)** |
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|  |  |  |  |
| **Net First Year Savings** |  |  | **$247,239.00** |

## Approvals

The business case is a document with which approval is granted or denied to move forward with the creation of a project. Therefore, the document should receive approval or disapproval from its executive review board

|  |  |  |  |
| --- | --- | --- | --- |
| **Approver Name** | **Title** | **Signature** | **Date** |
|  |  |  |  |
|  |  |  |  |