

## **Business Case Template**

**Please Note:** Two other templates are available that project managers may choose to use to complement this template. They are the 'Business Case Appraisal' and 'Business Case Appraisal for low-value projects'. Both are in Excel and will facilitate the calculation of implementation and recurring costs, benefits, return on investment, payback and so on. These templates can be found, along with the other Gating templates, by accessing the Gating home page <http://47.126.17.17/gate/gating.shtml> and selecting 'On-line Documentation' button.

### **Instructions for using this template:**

All text in this template is Times 12 with the exception of Bold headers and the Headers and Footers associated with each section. There are three sections, Section 1 being the title page, Section 2 is the Table of Contents and Section 3 is the body of the document.

These are the main styles associated with the document:

**footer** - to define the font/size and spacing to the footers;

**header** - to define the font/size and spacing to the headers;

**Normal** - to define the normal text for the document;

**Heading 1** - to define the high level sections of the document;

**Heading 2** - to define a level below the Section Header;

**toc 1** - to define the format of the Table of Contents and the place holder for putting a new TOC.  
Used with Heading 1

**toc 2** - to define the format of the indentation in the Table of Contents. Used with Heading 2

**figure** – to define the format and tag lines for illustrations. Used to collect the items that go in the List of Illustrations.

**tabletag** – to define the format and tag lines for tables. Used to collect the items that go in the List of Tables.

On the Even and Odd Footer for Section 2 and Section 3, replace Project Name with the name of the project and put in correct issue number. Change Project Name, Issue # and Month YYYY on title page to reflect the correct information for your project.

### **To compile the Table of Contents, Under Insert select Index and Tables**

Select Table of Contents, Heading 1 and Heading 2

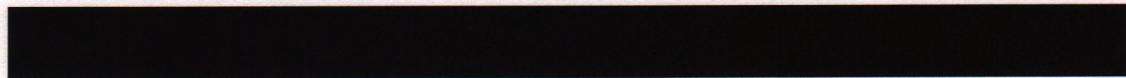
### **To compile the List of Illustrations, Under Insert select Index and Tables**

Select Table of Figures, Caption Lable Figure. Select Options, click Style and select *figure*

**To compile the list of Tables, Under Insert select Index and Tables**

Select Table of Figures, Caption Lable Table. Select Options, click Style and select *tabletag*

**Delete all the instructions and the section break at the end of the  
instructions before printing the finished document.**



# **Project Name**

## **Business Case**

Issue # Month YYYY

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## **List of Illustrations**

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## Acknowledgments

The project management team

IS Project Manager: (name and title)  
Organization: (org. name)

Customer Project Manager: (name and title)  
Organization: (org. name)

Project Owner: (name and title)  
Organization: (org. name)

recognizes the following persons and organizations that contributed to the development of this document.

### Prepared by:

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with input from the (Project Name) Project Team  
in particular:  
names and titles

and other organizations,  
in particular:  
Organization Names

**Table of Revisions**

Initial release of Business Case	Month YYYY
Second release of Business Case	Month2 YYYY
Final release of Business Case	Month3 YYYY

## Executive Overview

*Contains a brief, high level description of the following topics. Additional detail may be included in the sections contained in the Introduction.*

### **Objectives**

**Key business functions to be provided/enhanced**

### **Scope**

### **Assumptions and Dependencies**

## Purpose

*This section would give a high level view of the proposed project with its mission and goals.*

## Situation Analysis

*This section should document from a very high or macro level perspective the purpose of the project. The current and proposed situations should be described in terms of process, procedure, product, service and/or legacy systems and business value.*

## Intangible Benefits

*This section should document the intangible benefits to be gained by completing this project, i.e., customer satisfaction, competitive advantage, regulatory compliance, etc. or reference the Business Case Appraisal excel workbook here.*

## Tangible Benefits

*This section should document real dollar benefits that the customer will receive from this project in terms of cost improvement (CI), cost avoidance (CA), revenue stream, etc. or reference the Business Case Appraisal excel workbook here.*

## Additional Benefits

*This section should document other benefits that could be gained because of this project, but that are not a major consideration for doing the project or reference the Business Case Appraisal excel workbook here.*

## Costs

*This section should document any costs related to completing this project including: development costs, software costs, hardware costs, etc. as well as ongoing support costs or reference the Business Case Appraisal excel workbook here.*

## Marketing/Communication

### Product Valuation

*This section summarizes the long term benefits, immediate value, added value and client value adds to be derived from development and marketing the proposed product.*

### Product Positioning

*This section describes considerations of the common needs of market segments and the levels of service (basic versus premium) affordable by those market segments to arrive at a positioning / pricing strategy.*

## Impact and Risk Assessment

*This section should document the impact and risks of doing and not doing this project or reference the Business Case Appraisal excel workbook here.*

## Cost/Benefit Analysis

*Standard financial cost analysis should be included here or reference the Business Case Appraisal excel workbook here.*

## Recommendations

*This setion states the actions/options to be pursued upon approval of this gate.*

## Glossary

*If necessary or desired*

## References

*If necessary or desired.*