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SDLC Business Case

<Name of Project>

Instructions (For information only. Delete this section before distributing your business plan.)

1. Save the template to your desktop.

2. Update the header information.

3. Update any sections appearing in **blue font** with the information pertinent to your project.

4. Once you are comfortable with how to use each section in the template (and before sharing the document with your team), remove all template instructions which exist in orange font.

5. Revise the Table of Contents (TOC) before sharing (right click in the TOC section and choose Update Table).

6. Always spellcheck your work before sharing.

7. Obtain sign-off.

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<Project Name>

SDLC – Business Case

Document version:	<Document version number, i.e. V01>
Document date:	<MMMDDYYY>
Document author:	<Document author name>

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SDLC Business Case

<Name of Project>

Table of Contents

Contents

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SDLC Business Case

<Name of Project>

1. Executive Summary

Explain the rational for needing to pursue the organizational change. Provide a high-level description of the current state and present a high level explanation of the future state.

1A Situation Statement

Problem or opportunity of 'a'

Has the effect of 'b',

With the impact of 'c'.

2. Objectives

What are the business objectives your business customer wishes to accomplish with this change?

3. Benefits

Itemize the quantitative and qualitative benefits expected from addressing the situation, e.g., revenue or sales growth, cost reduction/avoidance or time savings, operational efficiencies, improved competitive position, productivity or process improvement gains, penetration into new markets, sales growth, etc. Explain how pursuing this initiative supports strategic and/or business objectives.

4. Key Performance Indicators

Identify how the benefits will be measured.

5. Success Criteria

Explain how the success of the initiative will be measured. How will the business customer know the change was successful?

6. Viable Options

Present at least three viable alternative solution options the business can consider to address the proposed change. Provide a high-level description of each option and the pros/cons of each option. It's acceptable to include this information in a table if that presents better or simply just include a paragraph for each option.

Always include the option of 'do nothing' and explain what happens if the organization chooses to take no action, addressing the situation at the present time.

Make sure you indicate (Recommended) next to the option you are recommending for the decision makers. This doesn't mean they will choose your selection – but they will look to you to have provided the most viable option after conducting your research. Decision makers will appreciate seeing what you recommend.

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SDLC Business Case

<Name of Project>

7. Timing for Benefits Realization

Explain when the business will begin to see the benefits for the recommended option.

Alternate approach: You can include this information for each solution option included in the business case (excluding the do-nothing option).

8. Risks

Explain the known risks for the recommended option. Provide any information known as to how risks identified could be mitigated (but keep the discussion high level).

Alternate approach: You can include the high-level risks for each option.

9. Key Assumptions

Explain the known key assumptions for the recommended option.

Alternate approach: You can include the relevant assumptions for each option.

10. Constraints

Explain the known constraints for the recommended option.

Alternate approach: You can include the known constraints for each option.

11. Dependencies

Explain any dependencies impacting the recommended option.

Alternate approach: You can include the known dependencies for each option.

12. High Level Solution Architecture

Include a high-level context diagram or a solution architecture diagram to depict visually what the proposed solution would look like. Ensure this is kept high level.

13. Proposed Milestones

Include a list of high-level dates and deliverables associated to the proposed option.

14. Product Roadmap

Provide a high-level view of how the solution features will be delivered over time or in phases. I suggest doing this only for the selected option.

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SDLC Business Case

<Name of Project>

15. Project Costs

Category	Cost	Year 1	Year 2
Capital cost	Labor		
Capital cost	Vendor		
Expense	Marketing/sales		
Expense	Training		

16. Operational Costs

Cost Category	Cost Description	Annual cost
Operational support		
Hardware mainte-nance		
Software licensing		

Note: change the row headings anyway needed. You should solicit assistance from your sponsor and a financial analyst. Often a program manager can assist as well. These costs are high level at this time.

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SDLC Business Case

<Name of Project>

17. Terms, Acronyms, Definitions

If needed, keep a list of any terms/acronyms your reader may need defined to understand the business case content. If you don't have anything, then delete this section and revise the table of contents.

Term/Acronym	Definitions

18.   Approvals

Include signature lines for your approvers. Upon approval – the business case can be presented to your key business decision makers. Typically, you only need to get approval by the sponsor. The sponsor is responsible to provide feedback and help you evolve the business case to ensure your research is representative of the whole picture that needs to be put forth to the decision makers.

19.   Revision History

Unique identifier	Author	Date of revision	Changes made
1.0		mm/dd/yyyy	Created initial draft