Ai Business Case Template

Comprehensive AI Implementation Guide

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AI BUSINESS CASE TEMPLATE

Building a Compelling Case for AI Investment

Executive Summary

Project Name: _____ **Requested Investment:** $__ **Expected ROI:** ____% over __ years
Payback Period: __ months **Strategic Importance:** High / Medium / Low

Problem Statement: [Describe the business problem or opportunity that AI will address]

Proposed Solution: [Brief description of the AI solution and its capabilities]

Expected Benefits: [Summary of quantified benefits and strategic value]

Business Problem

Current State: - [Describe current processes and pain points] - [Quantify current costs and inefficiencies] - [Identify competitive disadvantages]

Problem Impact: - Annual cost: $__ - Time wasted: __ hours/month - Customer impact: __ - **Competitive risk:** ___

Urgency: - [ ] Critical - Must address immediately - [ ] Important - Should address within 6 months - [ ] Moderate - Can address within 12 months - [ ] Low - Nice to have improvement

Proposed AI Solution

Solution Overview: [Detailed description of the AI solution]

Key Capabilities: - [Capability 1 and its business value] - [Capability 2 and its business value] - [Capability 3 and its business value]

Technology Approach: - AI/ML techniques: ___ - Data sources: ___ *- Integration points: _ - Platform/tools: _____*

Implementation Approach: - Phase 1: ___ *- Phase 2:* ___ - Phase 3: ____

Financial Analysis

Investment Required:

Category	Year 1	Year 2	Year 3	Total
Technology & Infrastructure	$____	$____	$____	$____
Software Licenses	$____	$____	$____	$____
Professional Services	$____	$____	$____	$____
Internal Resources	$____	$____	$____	$____
Training & Development	$____	$____	$____	$____
Total Investment	$____	$____	$____	$____

Expected Benefits:

Benefit Category	Year 1	Year 2	Year 3	Total
Cost Savings	$____	$____	$____	$____
Revenue Increase	$____	$____	$____	$____
Efficiency Gains	$____	$____	$____	$____
Risk Reduction	$____	$____	$____	$____
Total Benefits	$____	$____	$____	$____

ROI Calculation:

Metric	Year 1	Year 2	Year 3
Net Benefit	$____	$____	$____
Cumulative Investment	$____	$____	$____
ROI %	____%	____%	____%

Break-even Analysis: - Payback period: __ months - Break-even point: Month __ - NPV (3 years): $____

Strategic Benefits

Competitive Advantage: - [How AI will provide competitive differentiation] - [Market positioning improvements] - [Customer experience enhancements]

Innovation Enablement: - [New products/services enabled by AI] - [Future capabilities and opportunities] - [Platform for additional AI initiatives]

Operational Excellence: - [Process improvements and automation] - [Quality and accuracy enhancements] - [Scalability and efficiency gains]

Risk Mitigation: - [Risks reduced or eliminated] - [Compliance and security improvements] - [Business continuity enhancements]

Implementation Plan

Timeline:

Phase	Duration	Key Milestones	Resources Required
Planning	__ months	[Milestone 1]	[Resources]
Development	__ months	[Milestone 2]	[Resources]
Testing	__ months	[Milestone 3]	[Resources]
Deployment	__ months	[Milestone 4]	[Resources]
Optimization	__ months	[Milestone 5]	[Resources]

Resource Requirements:

Role	FTE	Duration	Cost
Project Manager	___	__ months	$____
Data Scientist	___	__ months	$____
ML Engineer	___	__ months	$____
Business Analyst	___	__ months	$____
External Consultants	___	__ months	$____

Dependencies: - [Critical dependencies and requirements] - [External factors that could impact timeline] - [Prerequisites that must be completed first]

Risk Analysis

Technical Risks:

Risk	Probability	Impact	Mitigation Strategy
Data quality issues	___%	High/Med/Low	[Mitigation approach]
Integration challenges	___%	High/Med/Low	[Mitigation approach]
Performance concerns	___%	High/Med/Low	[Mitigation approach]

Business Risks:

Risk	Probability	Impact	Mitigation Strategy

User adoption	___%	High/Med/Low	[Mitigation approach]
Budget overruns	___%	High/Med/Low	[Mitigation approach]
Timeline delays	___%	High/Med/Low	[Mitigation approach]

Risk Mitigation Budget: $____

Success Metrics

Key Performance Indicators:

KPI	Baseline	Target	Measurement Method
[KPI 1]	____	____	[How measured]
[KPI 2]	____	____	[How measured]
[KPI 3]	____	____	[How measured]

Success Criteria: - [ ] Technical performance meets requirements - [ ] Business benefits achieved within 6 months - [ ] User adoption exceeds 80% - [ ] ROI positive within 18 months

Monitoring and Reporting: - Monthly progress reports - Quarterly business review - Annual ROI assessment - Continuous performance monitoring

Alternative Options

Option 1: Do Nothing - Cost: $0 - Risk: [Describe risks of inaction] - Opportunity cost: $____

Option 2: Manual Process Improvement - Cost: $_ - *Benefits: $_* - Limitations: [Describe limitations]

Option 3: Traditional Technology Solution - Cost: $_ - *Benefits: $_* - Comparison to AI: [Why AI is better]

Recommendation

Recommended Action: Proceed with AI implementation

Justification: - [Key reasons supporting the recommendation] - [Alignment with business strategy] - [Competitive necessity] - [Financial attractiveness]

Next Steps: 1. Secure executive approval and budget 2. Assemble project team 3. Begin detailed planning and design 4. Initiate vendor selection process 5. Start change

management activities

Appendices

Appendix A: Detailed technical specifications **Appendix B:** Market research and competitive analysis **Appendix C:** Vendor evaluation and recommendations **Appendix D:** Detailed financial models and assumptions **Appendix E:** Risk register and mitigation plans

This template is provided by Expandia.ch - Your Partner in Building Practical, Scalable AI Solutions.

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