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# Business Case

<Insert Project Name>

<Date>

Version: <9.9>

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## 2 Roles and Responsibilities

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List the approvers of the business case and their role and responsibility.

Role	Resource Name	Responsibility
<b>Executive/ Project Sponsor</b>		<ul style="list-style-type: none"><li>▪ The primary business contact for the project.</li><li>▪ Responsible for allocating the time and resources necessary to ensure adequate input is given to complete the document.</li><li>▪ Responsible for signing-off on the completed Business Case.</li><li>▪ May be jointly responsible with the funding &amp; approval of the project.</li></ul>

### **3 Executive Summary**

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#### **3.1 Project Description**

*Briefly describe the project*

#### **3.2 Objective**

*State what business need the project is solving.*

### **3.3 Problem/Opportunity**

*Describe the current state of the problem and provide a brief description of the business impact, and the risks of undertaking the project. List any performance measures or goals and describe how the current process supports them. If there are no established measures, explain why there is a business need to improve performance.*

### **3.4 Proposed Solution**

*Describe how the project will take advantage of the opportunity, recommendations, and the financial impact of the project*

## **4 Project Background**

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### **4.1 Current State Process**

*Describe how the function is performed using the current system or process (if one exists)—whether it is automated, manual, or a combination. Include inputs, outputs and any pertinent processing descriptions.*

## 5 Project Overview

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### 5.1 In Scope

*Describe what is in scope for the project.*

### 5.2 Out of Scope

*Describe what is out of scope for the project.*

### 5.3 Deliverables

*Itemize the specific and measurable deliverables of the project. For each outcome include an estimated time frame of when the outcome/deliverable will be completed (in terms of elapse time from project start).*

Outcome/Deliverable	Estimated Completion

## **6 Alternatives**

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### **6.1 Alternative #1**

#### **6.1.1 Key Features**

*Explain the key features including people, processes, and system.*

#### **6.1.2 How the Alternative Meets the Business Opportunity**

*Describe how the alternative addresses the business opportunity.*

#### **6.1.3 How the Alternative Meets the Objectives**

*Describe how the alternative meets the objectives of the project.*

### **6.2 Alternative #2**

#### **6.2.1 Key Features**

*Explain the key features including people, processes, and system.*

#### **6.2.2 How the Alternative Meets the Business Opportunity**

*Describe how the alternative addresses the business opportunity.*

#### **6.2.3 How the Alternative Meets the Objectives**

*Describe how the alternative meets the objectives of the project.*

### **6.3 Alternative #3**

#### **6.3.1 Key Features**

*Explain the key features including people, processes, and system.*

#### **6.3.2 How the Alternative Meets the Business Opportunity**

*Describe how the alternative addresses the business opportunity.*

#### **6.3.3 How the Alternative Meets the Objectives**

*Describe how the alternative meets the objectives of the project.*

## 7 Business Impacts

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### 7.1 Impact Table

*List the impacted agency, the impact description and magnitude of the impact for each alternative*

Impacted Agency	Impact Description	1	2	3
General Services Department (GSD)	Staff training required	H	NA	NA

**H:** High magnitude of impact. Agency support and preparation is critical to the alternative's success

**M:** Medium impact that is manageable for the agency.

**L:** Low or minor impact to the agency.

**NA:** No impact to the agency.

## 8 Risk Assessment

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### 8.1 Risk Table

Using the table below, identify the probability of the risk occurring and the impact it may have on each alternative.

Risk	Alternative 1		Alternative 2		Alternative 3	
	Probability	Impact	Probability	Impact	Probability	Impact
Risk Description	H	M	Low	Low	Medium	Low
Risk Description	L	M	Medium	Low	Medium	Medium

#### 8.1.1 Probability of Risk

- H:** High probability of the event occurring.
- M:** Medium probability of the event occurring.
- L:** Low probability of the event occurring.

#### 8.1.2 Impact of Risk

- H:** High risk of the event to the project.
- M:** Medium risk of the event to the project.
- L:** Low risk of the event to the project.
- NA:** The event will not impact the project.

## 9 Cost Benefit Analysis

### 9.1 Project Benefits

*Examples of project benefits*

Functional Area	Direct Benefits	Indirect Benefits
Agency	<ul style="list-style-type: none"> <li>• Faster business transactions</li> <li>• Increased access to information</li> <li>• Increased data integration across applications</li> <li>• Fewer errors</li> </ul>	<ul style="list-style-type: none"> <li>• Stronger relationship with customer/citizens</li> <li>• Enhanced responsiveness</li> <li>• Better service</li> <li>• Enhanced agency reputation</li> </ul>
Information Services	<ul style="list-style-type: none"> <li>• More effectively integrated systems</li> <li>• Ease of support</li> </ul>	<ul style="list-style-type: none"> <li>• Increased system availability</li> <li>• More satisfied end-users</li> <li>• Availability of more accurate information to support data analysis activities</li> </ul>
Acquisition	<ul style="list-style-type: none"> <li>• Reduction of paper</li> <li>• Reduction of manual effort</li> <li>• Better information to make critical buying decisions</li> <li>• Error reductions</li> <li>• Reduced Inventory</li> </ul>	<ul style="list-style-type: none"> <li>• Fewer reorders due to discontinued items</li> <li>• Stronger vendor relationships</li> <li>• Cost reduction</li> </ul>
Customer Service	<ul style="list-style-type: none"> <li>• Reduce manual effort</li> <li>• Reduce data entry</li> <li>• Reduce paper process</li> <li>• Reduce staff or avoid hiring more staff</li> <li>• Move staff to more value-added jobs</li> </ul>	<ul style="list-style-type: none"> <li>• Faster, more effective customer support</li> <li>• Lower burden on mailroom</li> <li>• Reduced process steps facilitate faster processing of information</li> </ul>
Finance	<ul style="list-style-type: none"> <li>• Reduce discrepancies</li> <li>• Reduce claims and adjustments</li> <li>• Reduced data entry</li> </ul>	<ul style="list-style-type: none"> <li>• Process improvements in reconciliation of invoice, purchase order and remittance</li> <li>• Reduced phone time/ improved efficiency</li> </ul>
Administrative	<ul style="list-style-type: none"> <li>• Reduce manual effort</li> <li>• Reduce data entry errors</li> <li>• Reduce paper process</li> <li>• Reduce staff or avoid hiring more staff</li> <li>• Move staff to more value added jobs</li> </ul>	<ul style="list-style-type: none"> <li>• Reduce redundancy</li> <li>• Streamlined time to process information</li> <li>• Accomplish more without additional hires</li> </ul>

**9.2 Cost Benefit Summary**

Summary of Cost/Benefit	Alternative 1	Alternative 2	Alternative 3
Present Value of Total Benefits:	\$	\$	\$
Present Value of Total Costs:	\$	\$	\$
Net Present Value of Project	\$	\$	\$

**9.3 Financial Benefits and Costs**

*Provide a table for each alternative*

Financial Benefits and Costs	Year 0	Year 1	Year 2	Year 3	Year 4	Year 5
<b>Alternative 1</b>						
<b>Benefits:</b>						
Revenue	\$	\$	\$	\$	\$	\$
<b>Costs:</b>						
Analysis	\$	\$	\$	\$	\$	\$
Design	\$	\$	\$	\$	\$	\$
Implementation	\$	\$	\$	\$	\$	\$
<b>Ongoing Operational Costs:</b>						
Human Resources	\$	\$	\$	\$	\$	\$
Administration	\$	\$	\$	\$	\$	\$
<b>Net Benefit or Cost of Viable Alternative 1</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>

**9.4 Non-Financial Benefits and Costs**

*An example of a non-financial cost/benefit is reduced state image or increased customer satisfaction. These non-financial benefits and costs should be listed in the table below for each alternative.*

Non-Financial Benefits and Costs	Description	Stakeholder(s) Impacted
<b>Alternative 1</b>		
<b>Benefits:</b>		
Benefit 1	Description of benefit 1	
Benefit 2	Description of benefit 2	
<b>Costs:</b>		
Cost 1	Description of Cost 1	
Cost 2	Description of Cost 2	

**9.5 Assumptions**

*Assumptions used to determine, both quantitative and qualitative, costs and benefits should be clearly documented in the following table. This would include general assumptions as well as assumptions specific to each alternative.*

<b>Assumptions</b>	<b>Benefit/Cost</b>	<b>Alternate</b>

## **10 Recommendation**

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*Include the details of the recommended alternative for proceeding with the project. The extent of the recommendation may range from recommending approval for full project implementation to recommending a more detailed requirements analysis be done to validate some key business case components.*

## 11 Schedule

The Schedule Section provides high level schedule information that depicts milestones and deliverables for the duration of the project. A print screen from the Microsoft Project Plan or other application for project scheduling should be provided in this section.

	Task Name	Start	Finish	Resource Names
7	[-] <b>Managed Services Process Design and Documentation</b>	2/16/09	5/28/09	
8	[+] <b>Help desk processes</b>	3/9/09	4/8/09	
57	[+] <b>Account and Customer Relationship Management</b>	4/9/09	4/15/09	
69	[+] <b>Business Analysis/Functional Design</b>	4/14/09	4/21/09	
81	[+] <b>Requirements Analysis/Definition</b>	4/20/09	4/28/09	
93	[+] <b>Requirements Prioritization and Change Control Board</b>	4/28/09	5/6/09	
106	[+] <b>Change Management and Service Assurance Process</b>	5/6/09	5/14/09	
118	[+] <b>Architecture/Design Process</b>	5/14/09	5/22/09	
130	[+] <b>User Acceptance Testing Process</b>	5/20/09	5/28/09	
142	[+] <b>Governance/Executive Board Process</b>	2/16/09	4/24/09	
158	[+] <b>Vendor/Contract Management Process</b>	3/17/09	5/27/09	
192	[+] <b>Program and Project Management Process</b>	3/23/09	5/28/09	

## 12 Approval Signoffs

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Executive Project Sponsor:
e-Mail Signature: <b>Thu 3/19/2009 3:37 PM</b>
Business Owner:
e-Mail Signature:
Service Assurance:
e-Mail Signature: <b>Thu 3/19/2009 3:37 PM</b>