

<Insert Project Name>

Short Form Business Case

Project Phase: **Initiation**

Customer: <Insert Client Name>

Document ID: <Insert Document Identification Number>

Name	Position Title	Organization	Signature	Date

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Document Purpose

This document outlines the business case of an initiative. It is to be utilised during the Initiation Phase of a project where a viable solution has been pre-determined. The Customer and Project Team will typically provide inputs to this document and the Business Requirements will subsequently be compiled.

References

Document Name	Document Location	Author(s)

Acronyms, Definitions and Abbreviations

Item	Description

RASIC Chart

Name	Responsible	Approving	Supporting	Informed	Consulted

Version History

Version	Author	Date Issued	Change Description

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Distribution List

Name	Title	Review or Information

Contacts

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1. Executive Summary

2. Business Opportunity

3. Critical Success Factors

4. Recommended Option

4.1. <Insert Name of Option>

4.1.1. Benefits

Category	Benefit	Current Baseline	Forecast improvement
<i>Financial</i>	<i>New revenue generated</i>	<i>\$ x</i>	<i>\$ x</i>
	<i>Reduction in costs</i>	<i>\$ x</i>	<i>\$ x</i>
	<i>Increased profit margin</i>	<i>\$ x</i>	<i>\$ x</i>
<i>Operational</i>	<i>Improved operational efficiency</i>	<i>x %</i>	<i>x %</i>
	<i>Reduction in product time to market</i>	<i>x hrs</i>	<i>x hrs</i>
	<i>Enhanced quality of product / service</i>	<i>x %</i>	<i>x %</i>
<i>Customer</i>	<i>Improved customer satisfaction</i>	<i>x %</i>	<i>x %</i>
	<i>Increased customer retention</i>	<i>x %</i>	<i>x %</i>
	<i>Improved customer loyalty</i>	<i>Describe</i>	<i>Describe</i>
<i>Employee</i>	<i>Increased staff satisfaction</i>	<i>x %</i>	<i>x %</i>
	<i>Improved organizational culture</i>	<i>Describe</i>	<i>Describe</i>
	<i>Staff retention</i>	<i>x %</i>	<i>x %</i>

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4.1.2. Costs

Category	Cost	Value	Budgeted Y/N	CAPEX/OPEX
<i>People</i>	<i>Project Staff Salaries</i>	<i>\$ x</i>		
	<i>Contractors / Third Parties</i>	<i>\$ x</i>		
	<i>Training Courses></i>	<i>\$ x</i>		
<i>Physical</i>	<i>Building premises</i>	<i>\$ x</i>		
	<i>Equipment and materials</i>	<i>\$ x</i>		
	<i>Tools (e.g. computers, software)</i>	<i>\$ x</i>		
<i>Marketing</i>	<i>Advertising / branding</i>	<i>\$ x</i>		
	<i>Promotional materials</i>	<i>\$ x</i>		
	<i>PR and communications</i>	<i>\$ x</i>		
<i>Organisational</i>	<i>Operational down-time</i>	<i>\$ x</i>		
	<i>Short-term loss in productivity</i>	<i>\$ x</i>		

4.1.3. Feasibility

Component	Feasibility Rating (1-5)	Feasibility Determination Method
<i>New Technology</i>		<i>A technology Prototype was created to assess the solution</i>
<i>New People</i>		<i>A survey was completed to identify skill-set availability</i>
<i>New Processes</i>		<i>Processes within similar organizations were reviewed</i>
<i>New Assets</i>		<i>Physical assets were inspected</i>

4.1.4. Risks

Description	Likelihood L/M/H	Impact L/M/H	Mitigating Actions
<i>Inability to recruit</i>			<i>Outsource project to a company with proven</i>

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<i>skilled resources</i>			<i>industry experience and appropriately skilled staff</i>
<i>Technology solution is unable to deliver required results</i>			<i>Complete a pilot project to prove the technology solution will deliver the required results</i>
<i>Additional capital expenditure may be required in addition to that approved</i>			<i>Maintain strict cost management processes during the project</i>

4.1.5. Assumptions & Constraints

5. Alternative Options Considered

Other Options	Details	Reasons not pursued

6. Timeframe

Activity	Start Date	End Date
<i>Project Initiation task</i>		
<i>Project Planning Tasks</i>		
<i>Project Execution Tasks</i>		
<i>Project Closure</i>		

End of document
