[Project Title]

Business Case Document

Business cases are used to gather pertinent information on the benefit and value to the organization regarding a project and why it should be considered. It captures the benefits and describes how the business will improve if the project is successfully completed. The business case also serves as the guide to ensure the business leader who is developing it has considered all areas of the project to include scope, costs, return on investment, and how workflow will change. The business case is not technical in nature, but rather is used to collect information on the request so it can be evaluated for approval and prioritization.

# Project Overview / Executive Summary

*NOTE**: Describe the background business context, opportunities, and the goals for the project. Identify operational and/or clinical value of the work being performed.*

# The ‘Why’

*NOTE**: Why are we undertaking this project? What problem is the business trying to solve? What does the future look like if this project is successful?*

# Scope Overview

*NOTE**: In this section, clearly define the logical boundaries of your project. Scope statements are used to define not only what is within but also what is outside the boundaries of the project. Examples of areas that could be examined are people, data, processes, applications, and business areas. This section should also include major workflow, operations & product functions but is not intended to be a full list of requirements.*

## In Scope

## Out of Scope

# Financial Summary & Resource Overview

*NOTE**: This section should provide a high-level summary of the required capital and operating costs associated with the delivery of the defined project scope within the specified implementation timeline as well as any funding limitations.*

## Capital Costs

## *NOTE: E.g., Hardware, Professional Fees, Perpetual Licenses (one-time fee), IS Labor*

## Operating Costs

## *NOTE: E.g., Software Licenses, Software/Hardware Maintenance, IS Labor*

## Funding Limitations

## *NOTE: Comparing the planned expenditure of project funds against any limits on the commitment of funds for the project helping to identify any variances between the funding limits and the planned expenditures*

## Return on Investment Assessment

*NOTE: What is the total cost to implement and maintain and what is the monetary benefit? ROI is used as a predictive tool with expected profits and costs to inform future decisions and should include hard and soft assets as well as labor.*

# Integration Considerations

*NOTE**: This section identifies the coordination of system dependencies needed, E.g., integration points, or considerations, with other solutions, interfaces, legacy applications, technical areas, etc.*

# Facility / Space Considerations

*NOTE**: This section identifies any needs related to the physical space of the project. Examples**: Network, Power, HVAC, Electrical, Lighting, Move-in/out timelines, Asset removal/installation, cosmetic/finishes.*

# Transformation Impacts

*NOTE**: This section identifies any transformational, or process based, changes that will impact or affect any of the defined stakeholders. This includes definition of new, or revised processes, policies, or other workflow related impacts.*

# Assumptions

*NOTE**: Project assumptions are circumstances and events that need to occur and/or are considered true for the project to be successful.*

# Impacts of Not Implementing / Pursuing the Business Case

# High Level Milestones

*NOTE**: List any known milestone dates that have been established by the business owner or vendor. Identify time sensitive events, contractual obligations, facility openings, regulatory requirements, etc.*

|  |  |
| --- | --- |
| **Milestone(s)** | **Date** |
|  |  |
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|  |  |

## Estimated Time to Implement:

*NOTE**: This is a high-level estimate that includes all phases of a project – design, develop, test, train, go-live, and optimization. This can be expressed in months/weeks and should include the requested start date of the project.*

# Stakeholders

*NOTE**: An individual, group, or organization, who may affect, be affected by, or perceive itself to be affected by a decision, activity, or outcome of a project.*

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | ***Title*** | **Department** | **Email** |
|  | *Executive Sponsor*  *(Business Leader)* |  |  |
|  | *IS Leader (Director or Above)* |  |  |
|  | *Application Owner*  *(Manager or above)* |  |  |
|  | *Technical Owner (Can be same as Application Owner)* |  |  |
|  | *Business Owner* |  |  |
|  |  |  |  |
|  |  |  |  |