|  |
| --- |
|  |
| Business Case Template |
| [Type the document subtitle] |
|  |
|  |
| **[Pick the date]** |

Contents

[1. Executive Summary 4](#_Toc409379716)

[2. Opportunity Overview 4](#_Toc409379717)

[3. Context and Background 4](#_Toc409379718)

[4. Strategic Fit 4](#_Toc409379719)

[5. Financial Attractiveness 4](#_Toc409379720)

[6. Risks and Issues 4](#_Toc409379721)

[7. Technical Overview 4](#_Toc409379722)

[8. External Market Analysis 5](#_Toc409379723)

[8.1 Target market 5](#_Toc409379724)

[8.2 Market segmentation and addressable market 5](#_Toc409379725)

[8.3 Customer profile 5](#_Toc409379726)

[8.4 Substitute products 5](#_Toc409379727)

[8.5 Competition 5](#_Toc409379728)

[9. Internal Business Analysis 6](#_Toc409379729)

[9.1 Strengths and Weaknesses 6](#_Toc409379730)

[9.2 Strategic, Financial, and Marketing Fit 6](#_Toc409379731)

[9.3 Technical Capability 6](#_Toc409379732)

[10. Business Rationale 6](#_Toc409379733)

[10.1 Potential benefits 6](#_Toc409379734)

[10.2 Competitive Position 6](#_Toc409379735)

[11. Potential Alternatives 7](#_Toc409379736)

[12. Resource Requirements 7](#_Toc409379737)

[13. Financial Analysis 7](#_Toc409379738)

[14. Staff and training 7](#_Toc409379739)

[15. Capital and infrastructure 7](#_Toc409379740)

[16. Operations Plan 7](#_Toc409379741)

[17. Implementation Plan 7](#_Toc409379742)

# Executive Summary

*<A short summary of the overall business case>*

# Opportunity Overview

# Context and Background

*<An overview of the opportunity and related issues*

*What are the related complications / issues?*

*What is the chronology of events that have led to this point?*

*What is the decision required and when does it need to be made by?*

*What are the details of the proposed transaction? >*

# Strategic Fit

*<What is the organisational strategy and how does this business case support it?>*

# Financial Attractiveness

*<What is the projected investment and expected return?>*

# Risks and Issues

*<What are the main risks and issues, and how can these be addressed?*

*What is the likelihood of winning?>*

# Technical Overview

*<Describe the opportunity in terms of its technical requirements and the proposed technical strategy (if relevant)>*

# External Market Analysis

## 8.1 Target market

*<What is the target market?*

*What are the customer needs?*

*What are the market entry and/or exit barriers?>*

## 8.2 Market segmentation and addressable market

*<How is the market segmented?*

*What is the size of the addressable markets for each product and service>*

## 8.3 Customer profile

*<Who are the typical customers?*

*What are the customer requirements?*

*What are the “hot buttons”?>*

## 8.4 Substitute products

*<What are the substitute goods and services meeting the customer needs?>*

## 8.5 Competition

*<Who are the main competitors?*

*What are their strengths and weaknesses?*

*What are their market shares?*

*What is the basis of competition?>*

# Internal Business Analysis

## 9.1 Strengths and Weaknesses

*<What are the strengths and weaknesses of the opportunity to address the market need?>*

## 9.2 Strategic, Financial, and Marketing Fit

*<How does the opportunity fit with the short- and long-term strategic, marketing, and financial objectives>*

## 9.3 Technical Capability

*<What is the opportunity for fit with the organisation’s technological capabilities and platforms>?*

# Business Rationale

## 10.1 Potential benefits

*<What are the cost savings/synergies and additional revenue achieved from the opportunity? [Show projections model if available with NPV/IRR or similar analysis]*

*What are the qualitative costs / benefits? (E.g. greater customer visibility, increased product ranges)>*

## 10.2 Competitive Position

*<What is the competitive impact?*

*What are is the projected increase in market share?*

*What are the risks / issues?>*

# Potential Alternatives

*<What are the alternatives to pursuing this opportunity?*

*What are the issues/risks / costs associated with each?*

*What is the net present value (NPV) analysis of the likely alternatives as a basis of financial assessment?>*

# Resource Requirements

# Financial Analysis

*<What are the expenses and capital funding requirements?*

*What are the relevant assumptions made in the calculations? (Include sensitivity analysis on critical variables, as appropriate.)>*

# Staff and training

*<What are the staffing requirements?*

*What are the training requirements?>*

# Capital and infrastructure

*<What are the capital and infrastructure resourcing requirements?>*

# Operations Plan

*<What is the operations plan to execute on the opportunity?*

*What are the risk/issues and methods of mitigation?>*

# Implementation Plan

*<What is the implementation plan?*

*What are the key milestones?*

*What are the quality reviews?*

*What are the decision points?*

*What are the key events?*

*What is the approval process?>*