

Prepare, Present, and Perform with a Business Case



Before you develop your case

- Identify the need for a business case.
- Identify the format, whether informal, formal, short, long, slide deck, paper, Word document, or a combination.
- Identify key stakeholders and obtain preliminary support for the concept.
- Form a steering group or task group, if appropriate.
- Request or research relevant data, financial information, and contextual information.
- Identify the appropriate submission route. For government and healthcare agencies, or higher education, may have a formal application process.



Before you present your case, ask yourself these questions

- Does your analysis support your proposed project and problem statement?
- Does your problem statement describe a clear solution?
- Are the described project options appropriate to the problem?
- Is your project description detailed enough? Have you described the problem, cost of not solving the problem, the benefit of the project, and when the organization can expect to see benefits?
- Are the financials and other data accurate?
- Can you support your cost-benefit analysis with sufficient data and endorsements?
- Does the executive summary contain the key business case sections, organized in a logical narrative order?
- Have you spell checked and then proofread all formats of your presentation? Better still, have you let someone else proofread the documents?



After the presentation

- Obtain final approval.
- Update the business case to reflect any changes discussed in presentation meeting and other discussions.
- Notify all key stakeholders of approval.
- Initiate the project and track project progress according to any governance and administration stipulations.