

Business Case Template

1. Executive summary

This section should be completed after the rest of the document is finished and should be a succinct summary of all your major points; it should not contain any information that is not elsewhere in the document. Keep it concise.

1.1 Overview

There is no need to include an extensive introduction or background in this section, just a précis of the introduction, background, problem statement and objectives that are in the main body of the document.

Be sure to include information about the priority and importance of the project in the context of the Strategic Objectives of the facility/organisation, and the benefits to the facility/organisation of the project.

1.2 Options appraisal

Provide a brief summary of the options considered and the reasons for choosing the preferred option.

1.3 Costs and benefits

Summarise the main points and include sufficient detail so that your executive or approval committee can use this page as a ready reference.

2. Introduction

Project Name:

Project Sponsor/ Executive:

Project Manager:

2.1 Background

Provide a brief history of how the project came into being, and from where the authority and drive for it comes. Include background on the nature of the work conducted that explains why you want to take on the project.

2.2 Problem statement

Summarise clearly here the problem that the project is aiming to address. This should highlight any previous analyses of the problem that have been done and where the impetus for change exists; that is, where is the 'pain' and who is feeling it; and, if necessary, why your area or the department should be doing something about this and what are the likely consequences of not addressing the problem.

2.3 Strategic objectives

"A common cause of project failure is the lack of a clear link between the project and the organisation's key strategic priorities, including agreed measures of success."

Provide the high-level, strategic objectives of the facility/organisation within which this project sits, or the overall objective of your division or department.

After a brief pre-amble, you may put this in tabular form, e.g.:

Strategic objectives	Measure
E.g. To ensure the provision of safe, effective and efficient patient care	E.g. Adverse events

2.4 Project objectives

The project objectives highlight the products that are to be produced as a result of this project.

2.5 Related projects

Briefly state any other projects that are being undertaken that relate to the same strategic. Be sure to highlight whether there are interdependencies between this project and any of those projects.

3. Options analysis

You may be required to consider more than one option to achieve improvements in IP&C, and this section should contain an analysis of the options plus the 'do-nothing' option. Insert a description of each option considered, then include full details and analysis of all options in an Appendix.

1. Option 1 – do nothing ...
2. Option 2 –
3. Option 3 –

The following table summarises the comparisons of all options considered.

3.1 Preferred option

State the preferred option and why.

Options comparison

	Option 1 – <short description>	Option 2 – <short description>	Option 3 – <short description>
Benefits Benefits of each option (see APIC guide for advice on this).			
Disadvantages List the negative consequences of each option.			
Timescale Over what period will the costs be incurred and over what period will the benefits occur.			
Costs Summarise the costs and supporting assumptions associated with each option, including ongoing costs.			
Major Risks Provide a summary of the aggregated risk ratings, highlighting the major risks that will have an effect on the business objectives and benefits.			

4. Procurement

State what procurement action would need to be undertaken. Include an indicative timetable and justification for the proposed approach.

5. Project strategy

Key milestones and deliverables

The key milestones will be presented in a table, as follows:

Event / Milestone	Deliverable	Date (or elapsed time from start of project)

6. Costs – benefit analysis

Refer to the advice in the APIC guide to prepare this.

Outline how calculations for savings and benefits have been made – include attributable costs.

7. Project management and control

7.1 Business case

Write a brief statement on how this document will be kept up to date during the course of the project; that is, review points particularly where the expected scope, costs, benefits and savings figures are re-adjusted or confirmed. How will different versions be identified?

7.2 Governance

This section outlines the project management structure that you will use to manage the project Make sure you cover at least the following points:

- Who will oversee progress (E.g. committee, executive sponsor, divisional head)
- Who will manage the project?
- How will the facility executive be kept informed of progress?

7.3 Risk management

Check the organisational risk assessment tools and policy to undertake a risk assessment of each of the options

7.4 Progress monitoring

Enter here the mechanisms that you will establish to monitor and compare actual achievements against your baseline plan.