



Create A High Level Business Case Using Business Language

If you have an idea for creating something new or improving something that already exists, you need to make a case for it. Writing a business case can feel difficult when faced with a blank page. Where do you start? What should you include? This template will help.

Whether you have an idea for a new product / service, or you have a way to improve an existing process, product, or service, you can use this template to build a compelling case for it.

The template guides you through the business plan creation for your idea using two different perspectives. The customer/user perspective and the business perspective. Both are needed to make a complete and compelling case.

To create your business case, fill in the blanks and watch your business case take shape. If you're looking for inspiration, check out the examples at the end.

NOTE: This template helps you create the first iteration of a business case. After you get buy in for the idea you will need to go further into the detail. But for a first pass, this will help you include the key information in an organised way.



Customer / User perspective business case

Consider your idea from the perspective of the end user or customer. Then answer the following questions to create a simple narrative describing your idea.

What GOAL is the customer or user trying to achieve?

What PROBLEM(S) are preventing the customer or user from achieving the goal described above?
(The problems should directly relate to the solution your idea provides)

What is your proposed SOLUTION?
(Briefly describe what your solution does, but not how it does it)



What OUTCOMES will the customer or user get when they use your solution?

(State the outcomes in terms of the one or more of the categories in the table below. You do not need to complete every category but you should consider them all.)

Outcome category	Outcome description (quantify where possible)	Timeframes
Financial		Is it <u>1-off</u> or <u>recurring</u> Starts: Ends:
Speed		Is it <u>1-off</u> or <u>recurring</u> Starts: Ends:
Efficiency		Is it <u>1-off</u> or <u>recurring</u> Starts: Ends:
Quality		Is it <u>1-off</u> or <u>recurring</u> Starts: Ends:
Compliance		Is it <u>1-off</u> or <u>recurring</u> Starts: Ends:
Safety		Is it <u>1-off</u> or <u>recurring</u> Starts: Ends:
Reputation		Is it <u>1-off</u> or <u>recurring</u> Starts: Ends:
Engagement		Is it <u>1-off</u> or <u>recurring</u> Starts: Ends:
Satisfaction		Is it <u>1-off</u> or <u>recurring</u> Starts: Ends:



What EFFORT does the customer or user need to expend in order to get the outcomes promised by your solution?

(State the effort in terms of the one or more of the following categories Time, money, Resources, Physical Energy, Mental Energy)

Effort category	Effort description (quantify where possible)	Timeframes
Time		Is it <u>1-off</u> or <u>recurring</u> Starts: Ends:
Money		Is it <u>1-off</u> or <u>recurring</u> Starts: Ends:
Resources		Is it <u>1-off</u> or <u>recurring</u> Starts: Ends:
Physical energy		Is it <u>1-off</u> or <u>recurring</u> Starts: Ends:
Mental energy		Is it <u>1-off</u> or <u>recurring</u> Starts: Ends:



Business perspective business case

Consider your idea from the perspective of the end user or customer. Then answer the following questions to create a simple narrative describing your idea.

What GOAL is the business trying to achieve?

What PROBLEM(S) are preventing the business from achieving the goal described above?
(The problems should directly relate to the solution your idea provides)

What is your proposed SOLUTION?
(Briefly describe what your solution does, but not how it does it)



What OUTCOMES will the business get from your solution?

(State the outcomes in terms of the one or more of the categories in the table below. You do not need to complete every category but you should consider them all.)

Outcome category	Outcome description (quantify where possible)	Timeframes
Financial		Is it <u>1-off</u> or <u>recurring</u> Starts: Ends:
Speed		Is it <u>1-off</u> or <u>recurring</u> Starts: Ends:
Efficiency		Is it <u>1-off</u> or <u>recurring</u> Starts: Ends:
Quality		Is it <u>1-off</u> or <u>recurring</u> Starts: Ends:
Compliance		Is it <u>1-off</u> or <u>recurring</u> Starts: Ends:
Safety		Is it <u>1-off</u> or <u>recurring</u> Starts: Ends:
Reputation		Is it <u>1-off</u> or <u>recurring</u> Starts: Ends:
Engagement		Is it <u>1-off</u> or <u>recurring</u> Starts: Ends:
Satisfaction		Is it <u>1-off</u> or <u>recurring</u> Starts: Ends:



What EFFORT does the business need to expend in order to get the outcomes promised by your solution?

(State the effort in terms of the one or more of the following categories Time, money, Resources, Physical Energy, Mental Energy)

Effort category	Effort description (quantify where possible)	Timeframes
Time		Is it <u>1-off</u> or <u>recurring</u> Starts: Ends:
Money		Is it <u>1-off</u> or <u>recurring</u> Starts: Ends:
Resources		Is it <u>1-off</u> or <u>recurring</u> Starts: Ends:
Physical energy		Is it <u>1-off</u> or <u>recurring</u> Starts: Ends:
Mental energy		Is it <u>1-off</u> or <u>recurring</u> Starts: Ends:



Examples #1: Uber Eats

The following business case describes the popular food delivery service, Uber Eats. The case is made from a customer perspective and then from a business perspective.

Customer / User Perspective

- **Goal:** Get tasty takeout food at home.
- **Problem:** It takes time and effort to collect the food, parking is a pain, and the food is usually cold by the time I get home
- **Solution:** Have someone else collect the food and transport it quickly in a bag that keeps it hot.
- **Outcomes:** It's faster, more convenient, and the food is hotter when I get it
- **Effort:** I have to pay more than if I collected it myself

Outcome category	Outcome description (<i>quantify where possible</i>)	Timeframes
Speed	It is faster because the customer doesn't have to spend time parking, walking, etc.	<u>1-off</u> per order
Efficiency	It is a more efficient use of time for the customer because they can do other things while their food is being delivered. They don't need to travel.	
Quality	The food is hotter when they eat it compared to if they picked it up themselves.	
Satisfaction	Overall the experience is better than having to collect the food themselves.	

Effort category	Effort description (<i>quantify where possible</i>)	Timeframes
Time	The customer spends less time getting their food. It is delivered to them.	<u>1-off</u> per order
Money	It costs more for delivery than to collect. (but this doesn't take into account the cost of fuel, parking, etc. if the customer collects by themselves)	



Business Perspective

- **Goal:** Increase revenue for Uber
- **Problem:** Drivers are sitting idle for 30% of the time because there isn't enough demand to keep them busy
- **Solution:** New business idea to use the existing taxi drivers to deliver takeout food as well as people

Outcome Type	Description (<i>quantify where possible</i>)	Timeframes
Financial	We earn more revenue and profit through this new product/service offer.	<p style="text-align: center;"><u>recurring</u> Starts: When service goes live Ends: Never</p>
Efficiency	More efficient use of drivers working for us. Plus many of the systems for Uber taxi services will double up for Uber eats and we get more use out of them.	
Reputation	Company reputation with drivers increases because they earn more. Reputation with general public increases because they see the Uber name more often.	
Engagement	Driver and customer engagement improves because they have more reason and opportunity to use the app and use Uber services.	
Satisfaction	Driver satisfaction increases because they have more opportunities to be paid and less idle time.	

Effort Type	Effort description (<i>quantify where possible</i>)	Timeframes
Time	Time to design and build the service (<i>amount TBD</i>) Time to run the marketing, operations, and IT maintenance when the service is up and running	<p style="text-align: center;">1-off to build, recurring to operate Starts: ASAP Ends: TBD</p>
Money	We need funding, but we don't know how much yet. Next step = feasibility study and high level costing	
Resources	People in IT, marketing, product, ops etc. to design, build, and run the service. Plus drivers.	
Mental energy	The effort to think of everything needed to make this service a success.	<p style="text-align: center;">Starts: When the project begins Ends: 1 month after launch</p>

The **Effort** from the business perspective is stated as a high level summary of the types of effort required. Each effort must be quantified, but that doesn't need to happen in the very first version of the business case. To begin with it can be enough to state there is effort required, and the next step is to get approval to spend time evaluating what the specific effort will be.



Examples #2: Software upgrade to an internal system

The following example provides the business case for upgrading a software system within a company. The case is made from a customer perspective and then from a business perspective.

Customer / User Perspective

- **Goal:** Make the team's work as easy and efficient as possible.
- **Problem:** Two people spend 4 hours a week updating reports moving data between systems
- **Solution:** Automate the reports.
- **Outcomes:** Remove boring work, free up time for other things, the team will be happier
- **Effort:** The team needs to learn a new way of generating the reports. After that there's no effort because it is automated!

The **outcomes** in this example are speed, efficiency, and satisfaction

The **effort** the customer/user expends in this example is one-off effort to learn the new tool.

The **Time frames** for the outcomes start when the automation is built. The effort timeframes will be immediately after the automation is built for the training.

Business Perspective

- **Goal:** Fast, accurate, cheap reporting
- **Problem:** Reports are manually generated by people. It takes hours each week and has errors.
- **Solution:** Automate report generation
- **Outcomes:** Faster reporting. Fewer errors. Staff are available to do other work.
- **Effort:** The time, money, effort to design, build, and implement the automated reporting, plus ongoing maintenance and upgrades, etc.

The **outcomes** from the business perspective are financial, efficiency, reputation, and engagement.

The **effort** from the business perspective is stated as a high level summary of the types of effort required. Each effort must be quantified, but that doesn't need to happen in the very first version of the business case. To begin with it can be enough to state there is effort required, and the next step is to get approval to spend time evaluating what the specific effort will be.

The **Time frames** for the outcomes start when the automation is built and are "ongoing" for as long as the automation is working. The timeframes need to be defined for every one of the effort components, including separate timeframes for the initial build and the ongoing maintenance and support.