

Enter Project Name

**OE PM - Business Case
Presentation Template**

Month, Day, Year

Purpose

The Business Case Presentation is an optional template that can be used if it is deemed appropriate to present the results of the business case in a PowerPoint format.

Investment Description

- **Business Project Objective:** A one or two sentence describing the successful outcome of this project.
- **Problem/Opportunity Statement:** Problem/Opportunity Table from the Project Charter.

Investment Description

- **Solution Strategy:** Summarize the proposed project, including major activities, and key attributes of the solution. Explain how the proposed project addresses the specific business issues or opportunities identified in the previous section.
- **Strategic Fit:** Identify which of the company's strategic objectives this proposed project supports, and explain how (i.e. increases customer retention/acquisition, etc.). List project characteristics (e.g. regulatory requirement, corporate mandate, contract expiration, etc.)

Assumptions and Dependencies

- **Key Assumptions:** Specify any assumptions that are driving the project approach. Information should come from the Project Charter.
- **Strategic Fit:** List all efforts that this project is dependent on, as well as efforts that will depend on this project. Explain coordination efforts planned or underway.

Competitive Benchmarking

Discuss competitor's practices in the solution space.

Alternatives and Comparisons

Document each alternative solution considered. Discuss the “Do Nothing” alternative only if it is a viable alternative. Discuss the advantages and disadvantages of each alternative and why each was rejected.

Solution Recommendation

Document the recommended solution with a summary of the reasons why this solution is being recommended.

Benefits

▶ Revenue Benefits

Identify the incremental revenues anticipated. Clearly identify which business units will receive these benefits. For revenue projects consider the following factors: target market(s), size, growth rate, penetration/share, revenue cannibalization, pricing structure, price direction, market window. For revenue retention projects describe the basis for assumed accounts/assets saved. ecommend

▶ Productivity/Cost Savings

Identify the incremental cost savings. Distinguish between savings in sponsoring enterprise and savings in other enterprises.

- *Identify the incremental cost savings. Distinguish between savings in sponsoring enterprise and savings of other enterprises:*
- *What group or groups will be more productive as a result of this project?*
- *What percent productivity improvement is assumed in the Business Case? By activity? By function?*
- *What existing costs are we saving by investing in this project?*
- *What future costs are we avoiding by investing in this project?*
- *Have the affected organizations/functions agreed to the benefits cited in the Business Case?*
- *For headcount reduction projects - what are the employee relocation/reassignment costs?*

Benefits

▶ **Non-Economic Benefits**

Discuss non-economic benefits, including those related to regulatory requirements.

▶ **Benefits Realization**

List each expected benefit, whether it can be measured, and the proposed method for measurement. If the method for measurement does not currently exist, its' development should be included as a project requirement.

| Measurable Benefits | |
|-----------------------------|-----------------------------------|
| Benefits | Proposed Method for Measurement |
| Ex: Increased trade revenue | Ex: Reporting on number of clicks |
| | |

| Non-Measurable Benefits | |
|-------------------------|--|
| Benefits | Reason why Benefits are not Measurable |
| Ex: Increased security | Ex: Success defined as no significant security breaches, which are not currently happening now |
| | |

Cost Overview

- **Develop Cost and Capital Spending:** Identify all the relevant costs of developing the project. Discuss the cost and timeline of returning any applications, systems, or processes that would be replaced by the new vendor.
- **Ongoing Costs:** Identify the incremental impacts on the firm's Operating expense once the project is complete. Include both direct costs, as well as, any indirect costs that are not fully captured in the current cost allocation (e.g. mainframe processing (MIPS) impacts). Distinguish between ongoing costs in sponsoring enterprise and those of other enterprises.
- **FOE Resources:** Discuss FOE resource needs not accounted for by development costs (example: subject matter experts who will not be charged to the project, but from whom a significant time commitment is required).

Financial Summary

| | Year 0 | | | | | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 |
|--|--------|----|----|----|-------|--------|--------|--------|--------|--------|
| | Q1 | Q2 | Q3 | Q4 | Total | | | | | |
| Capital Expense | | | | | | | | | | |
| Operating Expense (not including Depreciation) | | | | | | | | | | |
| Total Cost (CapEx+OpEx) | | | | | | | | | | |
| Depreciation | | | | | | | | | | |