**[Customer Name and Logo]**

[Business Case Title]

Solution provided by Vendor



**[Summarize the purpose of this document]**

Prepared for:

Prepared by: Click or tap here to enter text.

Date Prepared: Monday, June 11, 2018

This document contains a basic outline for a B2B business case that could be presented to a prospective customer. It also contains some suggested best practices. The financial information in this document can be updated from the “ROI Calculator and Business Case Tookit.xlsx” tool using the AnalysisPlace Excel-to-Word Document Automation Add-In (see <https://analysisplace.com/Document-Automation> for details).

# Executive Summary

**A total investment of $1,622,013 into the proposed solution is expected to yield $8,649,419 in net benefits. That is an ROI of 533%.**

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|  | |  |  |  |  | | --- | --- | --- | --- | |  | One Time | Annual | Total (8-Year) | | Total Costs | $492,333 | $141,210 | $1,622,013 | | Total Benefits | $0 | $1,283,929 | $10,271,432 | | Net Benefits |  |  | $8,649,419 | |

Potential Content

* Description of proposed solution
* Customer-specific benefit summary: how will the customer benefit?
* Quantified costs, benefits, and ROI
* Other key information, such as timelines

Best Practices

* Content should be concise and very easy to understand
* Personalize the content (from the customer’s perspective)
* Be able to indicate that the solution and results are based on credible research and customer stakeholder buy-in

# Background Information

Potential Content

* Project background (What lead up to this point? Why is a solution being proposed?)
* Customer environment/profile, needs/issues, and industry trends

Best Practices

* Provide information that builds the case for change and positions the proposed solution as the resolution

# Solution Proposed

Potential Content

* Products, services, deliverables, quantities
* Clear, easy to understand descriptions of the solution, its key features, and how they enable customer-specific benefits
* Images, diagrams, and other graphical methods to clarify what is being proposed
* Implementation plan
* Scope
* Dependencies/prerequisites
* Alternative solutions and why they are inferior (including continuing as-is “the costs of doing nothing”)

Best Practices

* What business problems will the solution resolve? What business objectives will be achieved?
* Credibly convey why the proposed solution is the right fit for the customer
* Be able to communicate that the customer is likely to fully benefit from the solution (customer value enablement and realization are fully considered)

# Solution Benefits

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|  | |  |  |  |  | | --- | --- | --- | --- | | Benefit Type | One Time | Annual | Total (8-Year) | | Revenue Gains (Margin) | $0 | $473,929 | $3,791,432 | | Cost Savings | $0 | $360,000 | $2,880,000 | | Productivity Savings | $0 | $450,000 | $3,600,000 | | Total | $0 | $1,283,929 | $10,271,432 | |

Potential Content

* Stakeholder analysis: how will key stakeholders benefit from the solution?
* Strategic/qualitative/intangible and quantitative benefits
* KPI analysis: how much and how will key metrics improve due to the solution?
* Evidence: what credible research (publications, prior customers, subject-matter experts, etc.) is used to quantify the benefits?

Best Practices

* Provide a summary in the body and details in the appendix (or other easy-to-access documentation)
* Ensure that the flow from features/capabilities, to KPI improvements, to benefits is clear and credible
* Evidence of customer buy-in is critical

# Solution Costs

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
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|  | |  |  |  |  | | --- | --- | --- | --- | | Cost Type | One Time | Annual | Total (8-Year) | | Test Costs | $274,000 | $66,200 | $803,600 | | Internal Costs | $48,000 | $10,560 | $132,480 | | Internal Labor | $151,000 | $47,917 | $534,333 | | 3rd Party Services | $19,333 | $16,533 | $151,600 | | Total | $492,333 | $141,210 | $1,622,013 | |

Potential Content

* Solution provider costs (products, licensing, services)
* Other external costs
* Internal costs (implementation labor, management, support, training, facilities, etc.)

Best Practices

* Ensure that all “enablement” costs are included – the business case should include all costs related to enabling the customer to fully adopt the solution and realize its proposed benefits

# Financial Analysis

Potential Content

* Consolidation of costs and benefits
* Cash flow analysis: costs, benefits, and net benefits by year
* Calculation of NPV (net present value), IRR (internal rate of return), and payback period
* Sensitivity analysis

Best Practices

* Provide easy-to-understand summary in the body and details in the appendix
* Transparency – make it easy to understand how the details add up to the totals

# Solution Provider Overview

Potential Content

* Solution offerings, capabilities
* Ratings, reviews, awards, and testimonials

Best Practices

* Include information that increases the customer’s confidence that the solution provider offers solutions (with superior value propositions) that result in true value realization
* Demonstrate customer-desired characteristics, such as innovation, quality, and customer satisfaction (now and into the future)Other Sections

Potential Content

* Customer diagnostic data/results – evidence of need for the proposed solution
* Maturity assessment – show how the solution can help the customer adopt more best practices
* Stakeholder analysis (how will the solution address needs -- by stakeholder)
* Benefits map – flow from stakeholder needs/objectives, to solution capabilities, to benefits
* Risk assessment
* Customer success stories – demonstrate that other similar companies have benefited from similar solutions
* Implementation details
* Images, tables, charts, and diagrams
* Reference data
* Timelines
* Requirements (to fully adopt and realize benefits from the solution)
* Contract verbiage (service level agreement, change management, payment terms, reporting, etc.)
* Responsibilities
* Approvals (signature blocks)

Best Practices

* Carefully consider what content belongs in the body and what can be included in appendices or other documents

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| --- | --- | --- | --- |
|  | One Time | Annual | Total (8-Year) |
| Total Costs | $492,333 | $141,210 | $1,622,013 |
| Total Benefits | $0 | $1,283,929 | $10,271,432 |
| Net Benefits |  |  | $8,649,419 |