

## Business Case Planning Checklist

Project Name:	Proposed by:	Date:
<b>Planning Item</b>	<b>Guidelines for developing:</b>	
Customer needs (quantified)	Define the specific business needs that drive the investment proposal. Account for both current and future needs of the business. State how the proposed investment aligns with business and corporate strategic objectives.	
Market window (schedule driver)	Estimate the initial delivery schedule and cost of delayed delivery.	
Proposed solution features	List the features to be included and cite the specific business needs they satisfy. Present sufficient detail to allow the decision-makers to understand the business solution in order to evaluate it properly.	
Project organizational framework	Describe how the project will be structured. Assess: <ul style="list-style-type: none"> <li>▪ Complexity</li> <li>▪ Duration</li> <li>▪ Project leadership requirements</li> <li>▪ Project team skill requirements</li> <li>▪ Roles &amp; responsibilities</li> </ul>	
Competitive analysis	Describe how the proposed solution is competitive in the marketplace. Assess it against the top three competitors' offerings, including price and quality delivery.	
Risks	Identify the expected risks to which the project will be exposed. Assess the likelihood of each risk occurring and its impact on the project. Outline a plan for managing the risks; include risk-minimization measures and contingency plans for recovery and damage limitation.	
ROI	ROI benefits may either be incurred once upon the implementation of the proposed solution or recur over the operational life of the solution. They may yield direct revenue, or strategically position the enterprise for market gains. Identify the ROI benefits and classify them as such.	
Target customers	Identify who the key target customers of the proposed solution are and why they were selected.	
Critical success factors	List those factors that must be in place to ensure success of the proposed solution. Be specific. Examples (describe in specific project terms): <ul style="list-style-type: none"> <li>▪ Commitment and awareness from Executive Sponsors</li> <li>▪ Access to necessary source data</li> <li>▪ Cooperation by affected business or IT areas</li> <li>▪ Full-time staff assignments to project</li> </ul>	

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	<ul style="list-style-type: none"> <li>▪ Status of interfacing systems</li> </ul>
Resource requirements	<p>Identify the project resources by role and quantity, but not by name, over the life cycle of the proposed project. State how the resource estimate was calculated. Include an explanation of the split of effort between in-house and external resources, if appropriate.</p> <p>Examples of resource needs to consider:</p> <ul style="list-style-type: none"> <li>▪ Technical skills</li> <li>▪ Management skills</li> <li>▪ Technology resources</li> <li>▪ Capital</li> <li>▪ Partnerships, alliances</li> </ul>
Criteria for measuring success	<ul style="list-style-type: none"> <li>▪ Describe what measures will be applied to measure the success of the proposed solution.</li> </ul> <p>Examples (describe in specific project terms):</p> <ul style="list-style-type: none"> <li>▪ Financial (Cost vs. Revenue)</li> <li>▪ Performance</li> <li>▪ User acceptance</li> <li>▪ Schedule</li> <li>▪ Competitive differentiation</li> </ul>