

Create a Compelling Business Case



Use this tool to document a business case so it is easy to communicate and present. Test the assumptions and information with your stakeholders – and a neutral third party – to ensure it is compelling. Feed this information into your business plan, communications plans and stakeholder engagement plans as appropriate.

Current State

- Describe the current state – explain why it is undesirable or what opportunity exists to improve it.
- Clarify the cost or lost opportunity of maintaining the current state – how is it hurting business performance?
- Describe the problem.

Desired State

- Provide a vision of the desired state – what will it look like from different perspectives (employees, team leaders, middle management, senior management)

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Benefits of Achieving the Desired State

- Quantify what you can
- Describe subjectively benefits that cannot be measured
- Describe who will benefit and how
- Provide the “What’s in it for me?”
- Identify the benefits to those most impacted by the change

Costs of Achieving the Desired State

- Resources – people’s time & \$\$
- Describe the key barriers to change and their impacts

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Gap Analysis

- Describe “how you get there” – from the Current State to the Desired State
- Identify any risks
- Describe what the future might look like with no change

A business case is only as compelling as the target audience thinks that it is. Understand the audience. Know your stakeholders – not the people who will decide or influence the decision-makers, but also those people who may be involved in the implementation. If they’re not on board, your efforts may fail – regardless of the business case.